) CDC	Guidance, Legal,		authority action,	or update as well as other sign	ficant change th		lvance.	DHVCE 4
		Date	PHASE 1 Who completed	Date	PHASE 2 Who completed	Date	PHASE 3 Who completed	Date	PHASE 4 Who complete
Sical Office Office sanitation plan Review stock of sanitation supplies									
Signage for internal and external visitors so rules are clear Social distancing markings									
theck office ventilation systems and filters Intrance and Exits: Open, closed, locked (with appropriate emergency exit enabled), other Intrance and Exits: Open, closed, locked (with appropriate emergency exit enabled), other Intrance and Exits: Open, closed, locked (with appropriate emergency exit enabled), other Intrance and Exits: Open, closed, locked (with appropriate emergency exit enabled), other									
reakrooms Chairs removed Signs posted for maximum occupancy or social distancing									
Review rules for cleaning of dishes, utensils, equipment, microwaves, coffee makers, water service, dishwashers, sinks, counters,									
etc. ubicle and office workspace cleaning requirements									
ommon area cleaning and social distancing requirements rinter/copier/office machines cleaning plan buch screen/keyboards/mice/pads/desk phones etc. cleaning plan and requirements	+								
inimize sharing of equipment policy with cleaning of surfaces requirement before and after use oyee									
Review impacts to lower compensated employees who may have been negatively impacted by "stay pay" vs "enhanced"	+								
unemployment compensation to earn loan forgiveness syoffs and downsizing									
Review WARN Act concerns for employers employing over 100 employees laying off at least 50 (60 day notice)									
confirm security of location private and protected information is stored on and off site									
Impacts to 401(k) plans will come under scrutiny									
Sanitation policies in the workplace									
If use of mask and/or ventilators are required, provide proper education and training per CDC and OSHA guidance Review reporting and work release protocols (i.e. lawsuit already pending for wrongful death of a Walmart employee who	+								
complained of symptoms but was not released from work) eview, update and communicate clear policies for wage and hour, time tracking and overtime									
Communicate break, lunch and hour expectations Determine time tracking changes that may be needed for remote workers									
Communicate overtime request/approval plan nancial assistance and training for employees									
Investment councilors for assistance with retirement planning Budgeting assistance counseling	+								
What financial fears or concerns can you reduce or eliminate to allow increased productivity rellness plan review and updates									
ental health resources On-site or telehealth access for mental health resources	\blacksquare								
List of resources to access for improved mental health and wellbeing EAP hotline	+								
EAP hotline NAMI E-couch (a self help interactive program with modules for depression, generalized anxiety & worry, social anxiety, relationship	#								
E-couch (a self help interactive program with modules for depression, generalized anxiety & worry, social anxiety, relationship breakdown, loss and grief).www.ecouch.anu.edu.au Suicide prevention hotline 1.800.273.8255 / 1.800.273.TALK or 1.800.784.2433 / 1.800.SUICIDE	+								
Substance Abuse and Mental Health Service Administration (SAMHSA) Disaster Distress Helpline 1.800.985.5990 Education on mental health benefits available on employer plan									
Posted reminders of resources and health checks E-mail tag lines to report concerns or link to resources									
Mindfulness training, newsletters, blogs, etc. Calmness apps	#								
Training of managers and employee volunteers on Mental Health First Aid. www.mentalhealthfirstaid.org Provide calm spaces for self care/Recharge Room	+								
nysical health resources	#								
Exercise reminders and access to space/time for physical activity Ergonomics training and review of workspaces Sleep tips and reminders	#								
Sleep tips and reminders Personal hygiene reminder signage	#								
Dietary tips Water challenges and reminders emote Workforce	#								
Review remote workforce plan Ordering of supplies procedure									
Technology equipment inventory and use policy Policy for providing internet and cell services Internet and data security procedures and protocols									
Remote access, retrieval and wipe capability for company data Video meeting access and policies									
Plan for employee check in to proactively understand needs for support/assistance Virtual ergonomic check of home office set up Inventory and decisions/policy on any longer term furniture, equipment, supply needs	\perp								
Productivity KPI's, measures and communication plan Physical and mental wellness checks and resources									
Ideas for regular connection/collaboration with in-office colleagues for productivity, engagement and culture Office Workforce Social distancing rules for the office	+								
Rules for entering officewhat is your policy Mandatory self report of symptoms or vulnerabilities per CDC guidelines									
Temperature checks prior to entry: required, encouraged, optional, other Masks: required, encouraged, optional, other Gloves: required, encouraged, optional, other									
Testing: required, encouraged, optional, other Rules for testing, contact tracing and reporting if someone is positive									
Make sure it is compliant with current ADA and HR regulatory guidance									
Rules for reporting, responding to concerns and sending employees home when necessary without fear of losing job Ideas for in-office employees to maintain connection/collaboration with remote workers to maintain productivity, engagement and culture	++								
Rules for former break rooms, conference rooms and other social communing areas Sanitation requirements									
Staged work and break hours aveling Workforce Decide if the travel is necessary/essential or if it could be accomplished in another way	+								
Between offices Policies for travel and re-entry into office									
To/from client/carrier/vendor locations local Policy to ensure your employees adhere to safest standards of yours vs. other place visiting (use CDC guidelines as minimum required)				T	TTT		A C		TO
Make sure any visitors understand your expectations Interstate/National travel Know the Phase/open/close status of other states visiting or passing through				人		HE	AJ.		
Review travel policies and costs of travel plan changes Review travel insurance plans				NIC	HDAI		E CEI		CE
International Travel Review and decide policy for any quarantine requirements before return to office International medical plans and access				LVO	UIAI	<u> </u>		V	
Policy for closed travel or stay in place orders Policy for repatriation				in SIA (Group Partn	er			
Review travel policies and costs of travel plan changes Review travel insurance plans related issues									
troductions to income opportunities and referrals ow can you help your clients make more money									
troduction to resources hat resources are you using to run your business that may be helpful to your clients									
ow can you save your clients money? hat are industry specific resources your clients need to adjust to new risk environment	++	•							
uman Resources tools and strategic advise	\Box								
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Equipment lease review hore up funding sources, debt consolidation and financing keview all public funding grants and loans that may be advantageous for you or your clients update KPIs and monitor more frequently. Client count is king! LSystems thinking This should be imbedded in everything you doAsk the questions: Why are we doing this, is it necessary and are there more efficient ways vation with you use this opportunity to innovate? MINIORATION INTERPRETATION INTERPRETATIO									

Post COVID-19 - Client Insurance Checklist											
It is recommended that this checklist be reviewed completely with each Phase change of re-opening and with any m	aterial change	or update in CDC Guidance, Leg	al, Regulatory	, OSHA or Health Authority	y action, o	or update as well as o	ther significant change	that may not be pi	redictable in advance.		\top
	PHASE 1		PHASE 2				ASE 3		PHASE 4		\top
	Date	Who completed	Date	Who completed	d	Date	Who completed	Date	Who completed		T
Crisis planning reviews and updates											\Box
Coverage reviews and analysis											
Business Interruption											+
	1										\top
Read the specific policy forms and review with clients		_	1							1	+
Turn in claims as client's request even if you don't believe the policy language provides cover. Let carrier decide.											
Stay up to date on options like pending legislation sponsored by the joint industries trade coalition: The Recovery	-		+		+			+			+
Fund and PRIA											
Workers Compensation	 		+		+						+
Stay current with NCCI and carrier guidance	1		†								+
Review classifications and payroll with new employment changes			1								\top
Auto											
Review exposure base. Mileage up or down?											
Review ownership of vehicle and insurable interests											_
Personal vehicles used for delivery?											4
Work vehicles being provided for personal?				/ 1				, ,		 	+
Property										1	+
Property and lease changes?	-									1	+
Tenant and landlord liability review Liability										+	+
Review all liability policies in light of COVID and new expectations of public											+
D&O								2///			+
Potential shareholder suits											\top
Transit/trip											
Industry Specialty Coverages			V 12 CI	Croup Par	ctno	r					
Health and Employee Benefits		Q		Group Pai							
Review access of providers											_
Personal Insurance and business property											\perp
Cyber liability			1							1	+
Other										1	+
Where to save costs										 	\perp
Exposure reductions			1							 	+
Limits review Risk transfer			1					+		+	+
Other			1					+		+	+
										+	+
Risk mitigation										+	+
CDC guidelines for employers	-		1					-		+	+
OSHA guidelines and new requirements At home ergonomics training	-		1		+			+		+	+
·			1							+	+
Financing			1							+	+
Premium financing	-		1							+	+
Business continuity loan resources Alternative Risk Transfer										1	+