Risk, Insurance, And Cost Control Survey

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 ***Risk and Insurance Management***

SAMPLE

Prepared For:

| **Areas of Review** | **Recommendations** |
| --- | --- |
| 1. **Professional / Executive Liability**

**Medical and Facility Professional Liability*****Captives and Large Deductible Plans******Medical Directorship Coverage******Allied Health Professionals*****Directors & Officers Liability****Employment Practices Liability****Fiduciary Liability****Cyberguard**

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| --- |
| 1. Patient Notification & Credit Monitoring
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| 1. Data Recovery
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| 1. Regulatory Coverage
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| 1. Network Security & Privacy Insurance
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| 1. Recovery Audit Contractors (RAC)
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 | a1. Clinical Risk Management performed by your medical professional liability carriera2. Membership in Texas Ambulatory Surgery Center Society (TASCS) a3. Infection Prevention Training |
| 1. **Employee Benefits**

**Group Health Insurance, Vision, Dental****Health Savings Accounts (HSA), Health Reimbursement Accounts (HRA), Flexible Spending Accounts (FSA) and Section 125 Plans.** **Human Resource Consulting** **Professional Employer Organizations (PEOs)*****Payroll, Unemployment Taxes, Benefit Administration, Etc.***  | c. Legal Counsel *or* Human Resource Consulting:Provided by Advanced HR Solution [*www.advancedhrsolution.com*](http://www.advancedhrsolution.com)  |
| 1. **Commercial Insurance**

**Property Insurance, Business Interruption****General Liability Insurance****Commercial Umbrella****Workers’ Compensation *or*****ERISA Plan Nonsubscription****Commercial Auto** **Crime Insurance**

|  |  |
| --- | --- |
| A1 – Employee Theft | F1 – Computer Fraud |
| A2 - ERISA | F2 – Computer Restoration RrResRestorationRestoration |
| B - Forgery | G – Funds Transfer Fraud |
| C – On Premises | H1 – Personal Accts |
| D – In Transit | I – Claim Expense |
| E – Money Order & CC |  |

 | d. OSHCON Review – Free OSHA Compliance Survey performed on-site by Texas Department of Insurancef. Resource for Bank Fraud Information and Fraud Assessment: **Joan M. Calhoun***Vice President,**Dallas Treasury Sales Manager*Frost Bank |
| 1. **Other**

**Business Continuation****Life & Disability Income****Homeowners, Personal Auto, Umbrella** |  |