



PO Box 60769 | Harrisburg, PA 17106-0769
toll-free: (800) 895-9039 • office: (717) 526-1010 • fax: (717) 526-1020 • claims fax: (888) 692-2368

Producer Duties and Responsibilities For CCAP Insurance Programs

For The Following Pools:

PCoRP and PComp

And

PELICAN Insurance RRG

And These Endorsed Programs:

Tax Collector Bonds Program

Volunteers Special Risk Program

The Board of Directors for the Pennsylvania Counties Risk Pool (PCoRP), the Pennsylvania Counties Workers' Compensation Trust (PComp) and the Subscribers Advisory Committee of PELICAN Insurance have established that all members of these programs must designate a local insurance producer as their professional insurance representative. The local producer serves as a resource for the member, and represents the member, not PCoRP, PComp or PELICAN.

CCAP has established a similar requirement for members of the Tax Collector Bonds and Volunteers Special Risk Programs to designate a local insurance producer as their professional insurance representative. The local producer serves as a resource for the member, and represents the member, not the Tax Collector Bonds or the Volunteers Special Risk Program.

To assist members and their local producers in understanding the role of the producer in each of the programs listed above, CCAP has compiled this broad listing of duties and responsibilities. Please note that some apply to all programs, and some will apply only to specific programs. We also recognize that local insurance producers and the members they represent may work out their own individual listing of service requirements, and encourage the use of this document as a sample or template for that listing.

For the commission paid to the producer, members should expect the following services from their local producers:

UC Trust, PCoRP, PComp, COMCARE, PIMCC, PELICAN, CCAP Health Alliance and more!

website: www.pacounties.org/insurance email: insurance@pacounties.org

Underwriting/Risk Management:

1. Preparation of and/or assistance with the annual renewal application. This includes gathering underwriting information from the member, updating exposures, assisting the member with changes (new exposures, Industrial Appraisal information for PCoRP, etc.). The producer is responsible for ensuring a complete application is submitted on time.
2. Identify needed coverage enhancements and advise CCAP staff.
3. As advised by the member, report to CCAP any new member programs, projects or services which might result in a change in insurance exposures. For PELICAN, this includes notifying CCAP of any sanctions related to the PELICAN member from the Department of Health.
4. Request coverage clarifications from PCoRP, PComp and PELICAN.
5. For PCoRP, review the annual Industrial Appraisal property valuation report, and report changes or corrections to Industrial Appraisal.
6. Maintain records of insurance requests from the member or from PCoRP, PComp or PELICAN.
7. Explain coverages, programs and services to member staff and officials. This includes reviewing the PComp payroll classification guidelines with the member to ensure positions are reported in the correct payroll category.
8. Coordinate services with CCAP staff.
9. Advise CCAP of products and/or services that would improve PCoRP, PComp or PELICAN.
10. Provide to CCAP a copy of the producer's Pennsylvania Producer's License, and a Certificate of Insurance identifying the broker's E&O insurance coverage.

Marketing/Sales:

1. Review and offer any optional coverages to the member.
2. Place coverage not provided by PCoRP, PComp or PELICAN and coordinate with CCAP's programs.
3. Promote PCoRP, PComp and PELICAN programs/services to the members.
4. Coordinate an annual meeting with the member and CCAP staff.

Customer Service:

1. Keep CCAP staff apprised of member's questions, concerns or needs.
2. Report to CCAP changes in properties, vehicles, payrolls or other major changes.
3. Request Certificates of Insurance from PCoRP, PComp and PELICAN.
4. Review and advise the member on the annual renewal proposals from PCoRP, PComp or PELICAN.
5. Attend the annual CCAP Producer's Meeting.
6. Meet at least annually with staff of the member to review coverages.
7. Review of PCoRP, PComp and PELICAN information and decisions and advise member of their impact.
8. Maintain lists of property, equipment and vehicles.
9. Maintain accurate client files.
10. Analyze deductible options.

Claims:

1. Work with the member to ensure prompt reporting of claims and potential claims.
2. Review of loss runs with member and advise CCAP staff of any concerns or trends.

Note: Technically the nursing homes which belong to PELICAN are called subscribers. We have used the generic term member in this document for all our programs, and this includes PELICAN subscribers.