

# Cybersecurity Preparedness

## Insurance Renewal Checklist: Documents

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### Top 10 Documentation Preparations:

1. **Cybersecurity Policies & Procedures**

Have up-to-date policies covering access control, data protection, remote work, incident response, and acceptable use.

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2. **Incident Response Plan (IRP) & Tabletop Exercises**

Maintain a tested IRP and conduct tabletop exercises at least annually to validate response readiness.

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3. **Risk Assessments & Security Audits**

Complete internal and third-party cybersecurity risk assessments to identify gaps.

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4. **Regulatory & Compliance Documentation**

Ensure compliance with **CIS, NIST, SOC 2, ISO 27001, HIPAA, or other industry standards** as required.

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5. **Third-Party Vendor Risk Management**

Maintain vendor security assessments and contracts that address data security responsibilities.

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6. **Cybersecurity Training Records**

Document and track employee participation in security awareness and phishing training.

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7. **Cybersecurity Insurance History & Claims Documentation**

Gather previous policy details, claims history, and proof of remediation from past incidents.

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8. **Data Classification & Retention Policies**

Define data classification levels (public, internal, confidential, restricted) and enforce retention policies. Define if the company collects, processes, and stores PII (Personal Identifiable Information) or PHI (Protected Health Information).

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9. **Business Continuity & Disaster Recovery Plans (BCP/DRP)**

Ensure a documented and tested BCP/DRP exists, detailing response and recovery steps.

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10. **Funds Transfers and Banking Changes**

Define the process that is used to ensure the legitimacy of a funds transfer or change request.

### Bonus Tip: Pre-Fill an Insurance Application Template

Many insurers ask similar questions, so having a prepared document with responses, diagrams, and policies can streamline the process. For more information or to request a sample template, contact us at [info@netrio.com](mailto:info@netrio.com).