

SMOKY LAKE COUNTY



Title: Added Named Insured: Record Keeping Guidelines	Policy No.: B.04-01
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Legislation Reference:	Jubilee Insurance Agencies Ltd.
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Purpose:	To help the added named insured community organizations develop an insurance record keeping system that is efficient and easy to maintain.
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Policy Statement and Guidelines:	
<p>1. STATEMENT:</p> <p>To ensure continuity, consistency, and accuracy of record-keeping is maintained by the Added Named Insured Community Organizations.</p> <p>2. GUIDELINES:</p>	
FILE CATEGORY	RECOMMENDED CONTENT
Jubilee Insurance Program: Documentation	<ul style="list-style-type: none"> ▶ Overview of Jubilee Insurance Program. ▶ List of Prohibited and Restricted Risks. ▶ Insurance Certificates – all coverage lines. ▶ Asset Schedules: Buildings & Contents / Mobile Equipment / Automobiles. ▶ Copies of your organization's most current completed application form and letter of understanding with Smoky Lake County. ▶ Appraisal reports for your building and/or contents.
Maintenance: Logs	<ul style="list-style-type: none"> ▶ Copies of maintenance sheets in date order. ▶ Maintenance contracts. ▶ Independent fire or building inspection.
Facility Inspection: Forms	<ul style="list-style-type: none"> ▶ Facility inspection forms in date order. ▶ Copies of building or equipment repair invoices.
Facility Rental: Agreements	<ul style="list-style-type: none"> ▶ Facility rental agreements in date order. ▶ Pre- and post-rental inspection forms. ▶ Certificates of insurance from renters.

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Policy Statement and Guidelines:	
FILE CATEGORY	RECOMMENDED CONTENT
Incident: Reports	<ul style="list-style-type: none"> ▶ Copies of incident reports in date order. ▶ Copies of all photographs, witness statements or other documentation relating to each incident. ▶ Copies of claims-related documents, such as correspondence with claim adjusters.
Waiver Forms	<ul style="list-style-type: none"> ▶ Copies of waivers in date order. ▶ Copies
Correspondence / Minutes	<ul style="list-style-type: none"> ▶ Correspondence related to the use and operation of your building. ▶ Copies of minutes of board meetings

**Record-Keeping Guidelines structure and contents
is recommended by
Jubilee Insurance Agencies Ltd.**

All signed documents
should be safely stored
for a period of not less than 7 (seven) years.

	Date	Resolution Number
Approved	February 19, 2009	# 253-09 - Page # 8872
Amended		
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