



## Best Practice Designation

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Date: \_\_\_\_\_

Target Markets Program Administrator,

### Re: **Best Practices Designation Application**

Thank you for your TMPAA Best Practice Designation application. The next step in this process is the completion of an on site review of your program operation. An evaluator for Target Markets will be contacting you to schedule a visit to your office, to complete the certification review, using 5 criteria to create a composite evaluation score. The process proceeds from both discussions with your managers and designated associates, as well as a review of key procedures, measures and controls on which your firm relies to effectively manage ongoing operations.

To expedite the review, please have the following materials ready to read and discuss on the day of our visit. No information you deem confidential will leave your office.

- Organization Charts—including service years and experience
- Management Bios.
- Procedural and Workflow Manuals—Underwriting
- Systems Feature Summary
- Samples of System Generated management Control Reports
- Operational Audit Reports to Management
- Limits of Authority—Underwriting and Rating Guidelines
- Human Resource Manuals
- Hiring, Appraisal, and Termination Procedures
- Procedural and Workflow Manuals—Claims ( if applicable)
- Three years loss history/program experience
- Most recent carrier audit from largest program
- E&O history for private review

We look forward to completing the evaluation. Should you have any questions, please contact us.

Best regards,

Ray Scotto, TMPAA Executive Director

**Please note: No copies or documentation regarding carrier audits, loss information or other proprietary/confidential information will be removed from your office.**