



## **Accessing Recommendation Letter** (Commercial Lines)

1

When a recommendation letter is available, the agent will receive notification via email. Clicking on the link in the email will direct you to the login page. Once you've signed in, you will be redirected to the Loss Control report page.

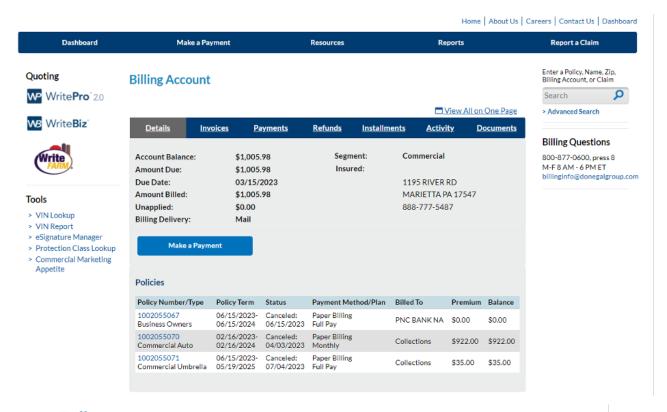


When you run the report, you will see a table of current loss control recommendations for all policies/accounts within the agency.



Revised (01/2025)

Once here, click on the billing account or policy number to get directed to the corresponding details for the account/policy.



## Policy

						■ View All on One Page						
<u>Details</u> <u>Bi</u>	lling	<u>Activity</u>	<u>Docume</u>	<u>ents</u>	<u>Claims</u>	Coverage	<u>es</u>	<u>Forms</u>				
Policy information as of: 05/20/2024												
Policy Status:	Car	nceled		Insured								
Policy Type:	ВО	Р		Account:		(View Billing D	<u> Details)</u>					
Policy Term:	03			Insured:		testing 15783	-1b					
Premium:	\$26	3.00				(View Insured	<u>Details)</u>					
Effective Date:	07/	12/2023		Agency:								
Expiration Date:	07/	12/2024										
Term:	Anı	nual										
Coverage Provided By	: Do	negal Mutual				(View Agency I	<u>Details)</u>					
	Ins	urance Compan	У									
Risk State:	MI											
Audit Status:	Cor	mpleted										
Policy Delivery:	Ma	il										
Policy Terms:												
	F	Data	T#	T Ct.		Chiles						
Effective Date	Expiration	Date	Term #	Term Star		Claims	Accou	int#				
07/12/2023	07/12/20	24	3	07/20/20		No Claims						
07/12/2023	07/12/20	24	2	CANCEL 07/12/20		No Claims						
07/12/2022	07/12/202	23	1	EXPIRED		No Claims						

Revised (01/2025) 2



Once on the details page, navigate to the documents tab and the Loss Control Recommendation Letter will be in the table. From there, the user can click the link to view the document with options to print/download as well.

## **Billing Account** View All on One Page **Documents Details** Invoices **Payments** Refunds Installments Activity **Billing Documents Issue Date** Description 03/12/2024 Loss Control Recommendation Letter 05/24/2023 Statement 03/24/2023 Correspondence 02/21/2023 Statement

Policy									
					□ View All	on One Page			
<u>Details</u>	Billing	<u>Activity</u>	<u>Documents</u>	<u>Claims</u>	Coverages	<u>Forms</u>			
olicy informatio	n as of: <b>05/20/2</b> 0	024							
Policy Docum	ents								
Show all rows	•								
Issue Date		Descrip	Description						
09/09/2023		Corresp	Correspondence						
09/06/2023		Recomn	Recommendation Letter						
09/06/2023		Recomn	Recommendation Letter						

**NOTE:** These letters will <u>NOT</u> be in the correspondence tab in the dashboard for an agent. The way to access these letters is only through the Loss Control Report or if an agent is already on the details for the account or policy. If there are cases where the Loss Control Report shows both the policy and account number, the agent may need to access both policy and account documents in order to find the Recommendation Letter. It may only be available under the policy or account.

The loss control services provided by Donegal Mutual Insurance Company and its affiliates ("Donegal") are intended to assist policyholders in managing and reducing potential risks and hazards that could lead to loss or damage. These services are advisory in nature and are offered as a courtesy to help our clients create safer working environments. Disclaimers and Limitations of Services:

**No Warranty:** The recommendations, suggestions, or guidance provided by our loss control representatives are based on general industry standards and practices. Donegal does not warrant or guarantee that compliance with these recommendations will prevent any specific loss, damage, or injury. **Not a Substitute for Legal or Professional Advice:** Our loss control services are not a substitute for legal advice, engineering assessments, or other professional services. Policyholders should consult with qualified professionals for specific advice tailored to their operations.

Policyholder Responsibility: It is the responsibility of the policyholder to implement any loss control recommendations and to ensure compliance with all applicable laws, regulations, and standards. Failure to do so may result in uncovered losses or other consequences as outlined in the policy terms.

No Liability: Donegal assumes no responsibility or liability for any loss, damage, or injury arising out of the use of, or reliance upon, the loss control services provided. The policyholder assumes full responsibility for any decisions made based on the information and recommendations provided by Donegal.

No Modification of Policy Terms: The provision of loss control services does not modify or waive any terms, conditions, exclusions, or limitations of the insurance policy. The policyholder's coverage is governed solely by the terms and conditions of the policy issued by Donegal.

Revised (01/2025) 3