

Prequalification Checklist

Preparation is the Key to Success

Before you get started with the prequalification process you'll want to make sure you have the following information on-hand:

- ✓ Last 3 years of OSHA logs (even if exempt from submitting to OSHA)
- ✓ Current experience modification rate (EMR), from your workers compensation carrier
- ✓ Proof of commercial liability insurance (general liability, auto liability, workers compensation, and excess liability are usually standard)
- ✓ Copy of your company's safety manual (may need to add chapters as required by the prequalification company)
- ✓ Proof of employee training completed within the last 12 months
- ✓ Company policies and procedures for safety and performance management (needed to complete questionnaires)

Helpful Hints

Top tips for success, suggested by our compliance experts:

- OSHA log templates can be downloaded for free at [osha.gov](https://www.osha.gov)
- Don't assume you can use an existing insurance certificate. In most cases you'll need to work with your insurance agent to meet specific requirements.
- When completing questionnaires be honest! Don't just select yes for everything. Your answers may trigger additional requirements.
- Be sure to add all the categories that your business operates in. This will help maximize your visibility, and potential for new business.

