MontRidge Insurance Services

TECHNOLOGY ERRORS & OMISSIONS CHECKLIST

Commercial Risk Education Series

A practical self-assessment to help identify insurance and operational risk topics for further discussion. Select Yes, No or Not Sure for each item. Leave items that do not apply blank. There is no score or passing grade.

SERVICES

	Yes	No	Not Sure
Are software and technology services accurately described?	○	○	○
Are implementation and integration responsibilities defined?	○	○	○
Are subcontracted developers and vendors documented?	○	○	○
Are customer reliance and critical use cases identified?	○	○	○

QUALITY

	Yes	No	Not Sure
Are release testing and approval procedures documented?	○	○	○
Are change requests and acceptance criteria recorded?	○	○	○
Are incident escalation and defect correction processes defined?	○	○	○
Are service interruptions and recovery procedures tested?	○	○	○

MontRidge Insurance Services

TECHNOLOGY ERRORS & OMISSIONS CHECKLIST

Commercial Risk Education Series

Continue your review. Select one response per item; leave non-applicable items blank.

INSURANCE

	Yes	No	Not Sure
Are technology E&O and cyber coverage distinguished?	○	○	○
Are retroactive dates and reporting requirements reviewed?	○	○	○
Are contractual liability and performance exclusions reviewed?	○	○	○
Are bodily injury and property damage limitations evaluated?	○	○	○

CONTRACTS

	Yes	No	Not Sure
Are warranties and service level obligations reviewed?	○	○	○
Are indemnities and liability caps reviewed by counsel?	○	○	○
Are intellectual property responsibilities documented?	○	○	○
Are new products and services reported to the insurance advisor?	○	○	○

MontRidge Insurance Services

TECHNOLOGY ERRORS & OMISSIONS CHECKLIST

Commercial Risk Education Series

NEXT STEPS

Use your responses to identify questions for your insurance advisor. A No or Not Sure response may warrant further review; a Yes response does not establish adequate insurance or compliance. Keep the completed checklist for your own records.

OPTIONAL CONSULTATION REQUEST

- ☐ I would like to discuss this checklist with Montridge.
- ☐ I would like to review my current insurance program.
- ☐ I would like to receive future educational resources.

OPTIONAL CONTACT INFORMATION

Name

Company

Title

Phone

Email

Preferred contact method

Questions or topics to discuss (avoid confidential or sensitive information)

To arrange a discussion, visit www.montridgeinsurance.com. This PDF does not transmit your responses automatically.

Educational use only. This checklist is not an insurance application, policy, coverage determination, compliance audit, or legal, tax, engineering, medical or financial advice. Coverage depends on actual policy terms, endorsements, exclusions and facts. Consult qualified advisers for your circumstances.