

# Checklist: Audits and Renewals



## Pre-Audit

- Watch for Audit Notification from Pie Insurance.
- Gather Key Documents:
  - Payroll Records
  - Quarterly Tax Reports
  - Profit & Loss Statements
  - Business Descriptions
- Know Your Audit Type: Mail, Phone, or In-Person.



## During the Audit

- Submit Documents promptly (within 2 weeks of policy expiration).
- Talk to Your Auditor for insights and clarifications.
- Review Audit Findings for accuracy.



## Post-Audit

- Handle Adjustments: Work with Pie Insurance on any premium changes.
- Prepare for Payment: Be ready for any additional premium or refund.



## Renewals

- Track DNR Date: Know when your renewal decision is due.
- Review Your Quote (expect it 30 days before policy expiration).
- Update Payroll Info early for accurate renewal pricing.



## If Non-renewed

- Watch for Notice and act quickly to find new coverage.
- Get Loss Runs within 3 days of non-renewal.



## Tips

- Stay Organized with up-to-date records.
- Respond Promptly to Pie Insurance requests.
- Ask Questions during the audit for clarity.
- Plan for Payments: Consider a payment plan if needed.