

Optimizing Security in Your Agency Management Software and 3rd Party Systems

As the custodian of your clients' data, YOU must ensure the care and protection of that data once it's in your hands.

Here's a checklist of tasks you can do now to better protect data in your agency management software and 3rd Party Systems:

- Review the following security settings:
 - Password settings
 - Multi-factor authentication (MFA)
 - Single-sign on (SSO)
 - Login restrictions
 - Access privileges and security groups
 - Import/ Export Controls
 - Document privileges
 - Audit and access logs
 - Integration, API, and other connectivity controls
- Identify, review, and configure 3rd party systems
- Request or find documentation of security practices
- Create an annual review plan for all of the above

**For the full NetVU presentation,
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