

# Optimizing Security in Your Agency Management Software and 3<sup>rd</sup> 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 3<sup>rd</sup> 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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