DOCU**TRAX**

Risk Manager Plan (self-managed)

You have full access to the Docutrax online platform for tracking COIs and documents. We will provide full training and onboarding assistance to ensure a complete and orderly start up. Thereafter, you will be responsible for all data management, data input, reporting, notification management and communication with Insureds, tenants, their brokers and other related parties. You may convert your self-managed plan into a full-service solution (RM Professional) at any time under a revised Subscription Agreement.

RM Professional Plan (full-service)

We will provide you with complete, daily full-service COI tracking and management, including all Certificate Holder and Insured data entry, maintenance, compliance reporting, communication with the Certificate Holder, the Insured and the Insured's broker with respect to certificate requests, compliance and renewal, and data management of new or revised insurance coverage requirements, document types, Certificate Holders, system users, permissions and modification to system-generated notifications. The following are included:

- Dedicated licensed Account Manager
- All data entry and management
- Compliance evaluation of all COIs
- Renewal monitoring
- Written and verbal communication to all relevant parties
- Maintenance of system users and permissions as directed by Client
- Regularly scheduled client reviews and updates