The Docutrax System

a. A cloud-based email/web-based system for tracking certificates of insurance ("COIs") and any type document.
b. COI tracking and document tracking may be run in conjunction or independent of each other.
c. System configurable to user-defined grouping of certificate holders or Insureds (tenants, vendors, etc.).
d. System configurable to track internal business processes and documents.
e. System supports any number of certificate holders, brokers, Insureds, risk profiles, system users, COIs and documents.
f. User-defined creation of COI and document Insured risk profiles.
g. Automatic compliance re-evaluation of any user change to existing risk profiles.
h. Customizable and branded notification templates.
i. Multiple notifications to Insured based on user-defined schedule.
j. Email Alerts for any risk profile waiver.
k. Email Alerts of non-responsive Insureds.
l. Email Alerts of missing, mal-formed or bounced email addresses.
m. Automated COI or document request(s) of new Insureds added to system.
n. Document requests may contain an example of the document.
o. Submission of COI data via secure web forms completed by Insured's broker.
p. Submission of document data by Insured or broker.
q. Submission of COI data by multiple brokers supported.
r. Optional manual COI data input capability.
s. Automated COI compliance evaluation of risk profiles.
t. Visual document review for determination of approval/disapproval.
u. Context-sensitive email notification detailing specific COI or document compliance deficiencies.
v. Automated renewal monitoring and notification of expiring/expired COIs and documents.
w. Recurring document request schedule supported.
x. Full audit trail - all COIs and documents are retained in the system and are accessible at anytime.
y. Data integrity - once submitted, COIs and documents may not be altered except by a system administrator.
z. Login credentials are specific to individual system users and their level of system access.
aa. System retains both active and inactive Insured's COI and document data.
bb. Electronic upload/download of Insured's or certificate holder profile data.
cc. 24/7/365 real-time access on any device.

Reporting

a. Display or download reports in Excel and PDF formats.
b. Standard reports
    - Listing of all Insureds in the system and their compliance status, earliest policy expiration date, active/inactive status.
    - Listing of all COIs and documents in compliance or non-compliance.
    - Listing of expired and soon to expire COIs and documents.
    - Listing of Insureds with risk profiles waived.
    - Listing of all non-responsive Insureds.
    - Display of all COIs and documents and all notifications issued to Insured.
c. Alerts

    The system automatically notifies designed system user(s) upon any of the following conditions:
    - After three attempts, failure of Insured to submit requested COI or document.
    - After three attempts, failure of Insured to bring an existing COI or document into compliance.
    - After four attempts, failure of Insured to replace an expired COI or document.
    - Receipt of any document pending review by system user(s).
    - Incorrect, missing or mal-formed email addresses.

For More Information
To learn more, please visit http://docutrax.com

- To arrange for an online demonstration please contact: demo@docutrax.com or call 855-747-5866 for further information.