DocuTrax Work Flow Chart

Client sends tenant information & certificates to DocuTrax

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Client sends tenant standards to DocuTrax

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DocuTrax alerts Client if no standard was received

DocuTrax loads tenant information & certificates into system
(All tenant contact information will be defaulted to email addresses at Client)

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DocuTrax reviews certificates

Expired Certificate	**Current Certificate**	**No Certificate**	**Missing Line / Endorsements** CGL, Property, WC, Auto, Excess PNC, AI, Waiver of Subrogation
DocuTrax contacts Client		DocuTrax contacts Client	DocuTrax contacts Client
Client gets current certificate		Client gets current certificate	Client reviews the tenant's lease
Client sends new certificate to DocuTrax		Client sends new certificate to DocuTrax	If line of coverage is missing, Client gets revised certificate from tenant

If line of coverage is NOT missing, update requirements for tenant in DocuTrax

Client sends new certificate to DocuTrax

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DocuTrax performs compliance review against standard

Compliant	**Non-compliant**
GREEN	DocuTrax contacts Client
	Client reviews the tenant's lease
	If information is missing, Client gets revised certificate from tenant

If information is NOT missing, update requirements for tenant in DocuTrax

Client sends new certificate to DocuTrax

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Tenant is compliant

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Give DocuTrax tenant contact information, which will now replace Client contact information

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DocuTrax will handle compliance going forward