



To ensure an orderly and thorough onboarding process, we provide full implementation services to all Docutrax clients.

The following are included:

- Client needs analysis / discovery
- System configuration
- Creation of Certificate Holders or Groups as provided by client
- Assignment of Risk Profiles to each Insured as directed by client
- Creation of Insureds as provided by client
- Creation of System Users and access permissions as directed by client
- Creation of custom letter templates as directed by client
- Client final review, test and approval prior to activation

As part of the Implementation process, we will need the following information from the client:

- All necessary Certificate Holder and Insured data
- All available email addresses associated with the above
- The insurance requirements associated with each Insured
- Samples of any existing letters used in correspondence with Insureds or their Brokers