



Insurance Certificate Tracking and Document Management Software Fastrack© - Windows Version Feature Highlight Sheet

- **Insurance Certificate Tracking**
 - Custom Insurance Requirement Categories used to set vendor certificate policy, limit and additional terms requirements.
 - Compliance verified for no certificate, missing policies, insufficient limits, missing additional terms, soon to expire and expired policy dates
 - Ability to override individual policy, limit or additional term requirements
 - Automatically print/email non-compliance follow-up letters (includes envelopes)
 - Letter template customizable
 - Multiple templates at Group level
 - Reminder letter sent after 30 days (days between letters a user defined period)
 - Unlimited attachments (jpg, pdf, doc, xls and bmp formats)
 - Freeform notes
 - Insurance certificate can be tied to a contract

- **Document Management**
 - Tracking for contract approval date, expiration date and action item dates.
 - Monitor financial data for total value, amount paid and balance due
 - Ability to enter unlimited action items per contract. Each action item contains:
 - Item number and description
 - Due date, Completion date and Tracking Date
 - Amount added and amount paid
 - Attachment (jpg, pdf, doc, xls, and bmp formats)
 - Freeform notes.
 - Document automatically tied to an insurance certificate

- Three user defined fields (Group, Service, Xref) to organize/identify vendors for filtering/sorting
- A.M. Best Rating Check
- Ability to import and export using Excel
- OCR scanning of ACORD forms available as Add-on
- Password access with multiple levels of user rights
- Program setup screen to assign system defaults
- Audit trail
- Comprehensive insurance certificate and document tracking reports