

**Insurance Certificate Tracking and Contract Management  
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 at certificate level (jpg, pdf, doc, xls and bmp formats)
  - ◇ Freeform notes
  - ◇ Insurance certificate can be tied to a contract
  
- ◆ Contract 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.
  - ◇ Contract 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
- ◆ Password access with multiple levels of user rights
- ◆ Program setup screen to assign system defaults
- ◆ Audit trail
- ◆ Comprehensive insurance certificate and document tracking reports