

# **iFastrack v8.09 Tutorial**

## **Data Maintenance**

This tutorial provides an overview of the iFastrack Data Maintenance Section including adding Insurance Requirement Categories, cc Names, Groups, Services and Brokers.

# Maintenance Selections



The Maintenance Menu provides access to three maintenance activities:

- Data Maintenance – Build cc Lists, Insurance Rqmt Categories and fields, Groups, Services
- System Maintenance – Enter Program Defaults, Companies, Users and Access Rights
- System Utilities – View Audit Log, Import/Export Data

# Build Program Tables



Data Maintenance provides options to build your letter copy CC list, Insurance Requirement Categories including the Policy names, Limit field names and Additional Terms, Standard Notes for Letters, Groups, Services and Brokers. Data tables created in this section will be used by the system to build drop down lists for selection by other screens.

# Letter Copy (cc) – Main Screen

Letter Copy (cc)

Search for

Name

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<input type="checkbox"/>	Name	Title
<input type="checkbox"/>	Jill Smith	Insurance Advisor
<input type="checkbox"/>	Mary Jones	Mgr

Enter names to be included as cc copies on the bottom of the insurance follow-up letters. Each letter can have three cc names listed. The cc names are selected from a drop down box on the insurance certificate screen. Copies of letters are automatically created for each cc name and either printed or emailed.

# Letter Copy (cc) – Add/Edit Screen

**Add Letter Copies (cc)**

Company

\* Name

Title

Address 1

Address 2

City

State/Prov

Country

Phone Number

Email

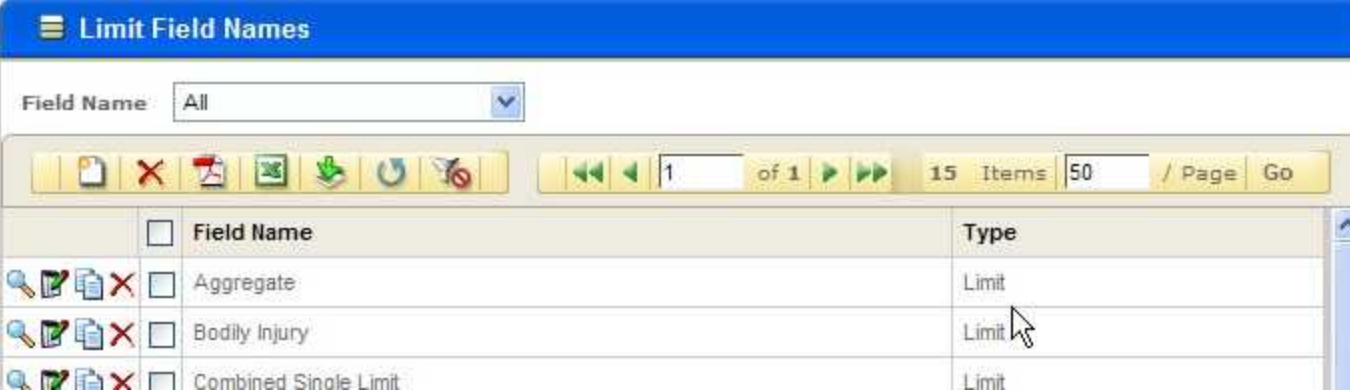
ZIP Code

Fax

Followup Method

Enter the cc persons contact information. Follow-up method Email requires a valid email address. If printing, an envelope/label is also printed with the letter copy.

# Limit Field Names – Main Screen



Field Name: All

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<input type="checkbox"/>	Field Name	Type
<input type="checkbox"/>	Aggregate	Limit
<input type="checkbox"/>	Bodily Injury	Limit
<input type="checkbox"/>	Combined Single Limit	Limit

This Limit Field Names screen displays the list of Limit Fields used in building Insurance Requirement Categories. These fields are used in the Policy screen to assign up to three limits to track for a particular Policy. You can add, edit, delete or show the Limit Field. If the Type is Limit, the software verifies that the actual limit amount is equal to or greater than the required limit amount. If Type is Deductible, the software verifies that the actual limit amount is less than or equal to the required limit amount.

## Limit Field Names – Add/Edit Screen



 Edit Limit Field Name	
* Field Name	eg: Each Occurance Aggregate
Type	Limit 

Enter the Limit Field Name and select whether the Limit Type is Limit or Deductible.

# Policies – Main Screen



The screenshot shows a web application interface for managing policies. At the top is a blue header with a menu icon and the text "Policies". Below the header is a toolbar with icons for search, add, edit, delete, and refresh. To the right of the toolbar is a pagination control showing "1 of 1" items, "5 Items" per page, and a "Go" button. Below the toolbar is a table with the following columns: "Policy Name", "Field - 1", "Field - 2", and "Field - 3". The table contains three rows of data, each with a checkbox and a set of icons (search, add, edit, delete, show) to the left of the policy name.

<input type="checkbox"/>	Policy Name	Field - 1	Field - 2	Field - 3
<input type="checkbox"/>	Auto Liability	Combined Single Limit	Property Damage	Bodily Injury
<input type="checkbox"/>	Excess	Each Occurrence	Aggregate	Unused
<input type="checkbox"/>	General Liability	Each Occurrence	General Aggregate	Product Comps

The Policies screen displays the list of Policy names created for use in building Insurance Requirement Categories. Next to each Policy Name are the three Limit fields associated with the Policy. You can Add, Edit, Copy, Delete and Show a Policy.

# Policies – Add/Edit Screen

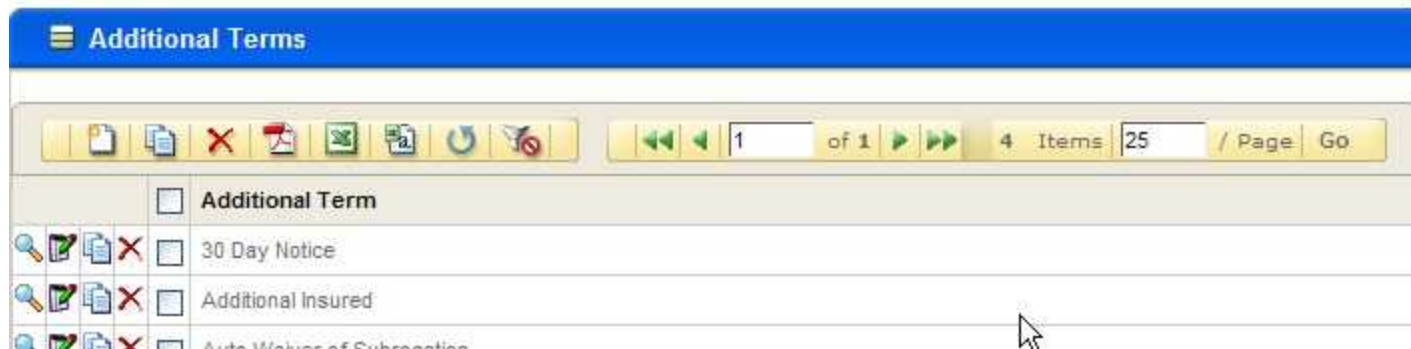


The screenshot shows a software interface titled "Edit Policy". It contains a form with the following fields:

Field Label	Value	Action
* Policy Name	Auto Liability	
Field 1	Combined Single Limit	Dropdown arrow and file icon
Field 2	Property Damage	Dropdown arrow and file icon
Field 3	Bodily Injury	Dropdown arrow and file icon

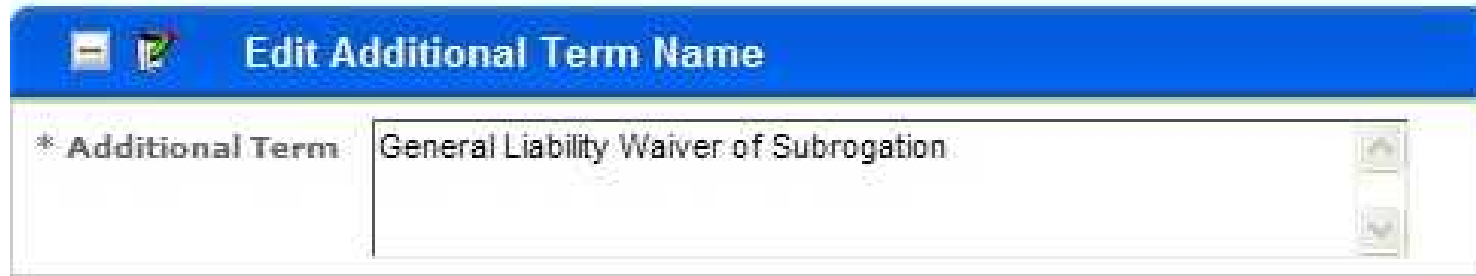
The Policy Add/Edit Screen allows you to enter a custom Policy Name and select up to three Limit fields to be tracked for the Policy.

# Additional Terms – Main Screen



The Additional Terms Screen displays the list of Additional Terms created for use in building Insurance Requirement Categories. You can Add, Edit, Copy, Delete and Show an Additional Term. Additional terms are limited to 250 characters.

## Additional Terms – Add/Edit Screen



Edit Additional Term Name	
* Additional Term	General Liability Waiver of Subrogation

Key in the Additional Term. Terms are selected as part of Insurance Requirement Category and are displayed and printed in their entirety on screens and in non-compliance follow-up letters. There is no limit to the length of an Additional Term.

# Insurance Rqmt Categories – Main Screen

**Insurance Requirement Categories**

Search for

Category

**Before creating Insurance Requirement Categories:**  
You will need to build Limit Field Names, Policies and Additional Terms Name using Data Maintenance menu selections:

- 1) Limit Field Names
- 2) Policies
- 3) Additional Terms Name

Note: these tables come preloaded with common values, but may need changes or additions based on your requirements.

1 2 of 1 2 Items 50 / Page Go

<input type="checkbox"/>	Category	Description
<input type="checkbox"/>	High 1	High Risk Requirement Category
<input type="checkbox"/>	Standard	Standard Requirement Category

The Insurance Requirement Categories screen displays the list of Insurance Requirement Categories created for verifying that Vendor Insurance Certificates are compliant. You can Add, Edit, Delete and Show a Category. Categories are constructed in three parts: Category Name and Description; Policies/limit amounts required; and Additional Terms required.

# Insurance Rqmt Categories – Add/Edit Screen

## Part 1 – Name and Description



Add Insurance Requirement Category	
* Category	Low Risk
Description	Minimum coverage required - only GL and WC

Enter an Insurance Rqmt Category Name and Description. The Category Name will appear in a drop down box in the Vendor Insurance Screen. The selected Category is used to determine Vendor Insurance compliance. Create easily recognizable names related to their associated policy and term requirements. For a new Category, select Save - the Edit Category screen will then appear to select the required Policies, Limits and Additional Terms.

# Insurance Rqmt Categories – Add/Edit Screen

## Part 2 – Policies

Category Policies | Category Terms

**Category Policy**

1 of 1
 

 3 Items
  / Page

<input type="checkbox"/>	Policy	Required	Limit 1	Limit 2	Limit 3	Comb. w/XS
<input checked="" type="checkbox"/>	Excess	<input type="checkbox"/>	Each Occurrence <input type="text"/>	Aggregate <input type="text"/>	Unused	
<input checked="" type="checkbox"/>	General Liability		Each Occurrence \$2,000,000	General Aggregate \$2,000,000	Product Comps \$2,000,000	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Workers Comp		Each Accident \$1,000,000	Disease Each Employee \$1,000,000	Disease Policy Limit \$1,000,000	<input type="checkbox"/>

Policies required for the selected Insurance Rqmt Category are listed. You can add new policies or delete policies on the list. Enter the policy limit requirements into the Limit fields. To combine the policy limits with Excess coverage limits to meet policy limit requirements, click the Comb. w/XS box. See next slide for the Policy Add screen.

Note: if you do not require Excess coverage, do not add Excess as a policy to the Insurance Requirement Category. The software will automatically add Excess as 'not required' if Combine w/XS is checked for any of the other policies required. You can then easily check Excess as received for the vender insurance entry. You cannot change the policy name 'Excess' to another name as the software triggers off that specific spelling.

# Insurance Rqmt Categories – Add/Edit Screen

## Part 2a – Add Policy



Policies available for selection are listed in the drop down box. Select the Policy you want to add to the Insurance Requirement Category.

# Insurance Rqmt Categories – Add/Edit Screen

## Part 3 – Additional Terms

<input type="checkbox"/>	Term Name
<input checked="" type="checkbox"/>	30 Day Notice
<input checked="" type="checkbox"/>	Additional Insured

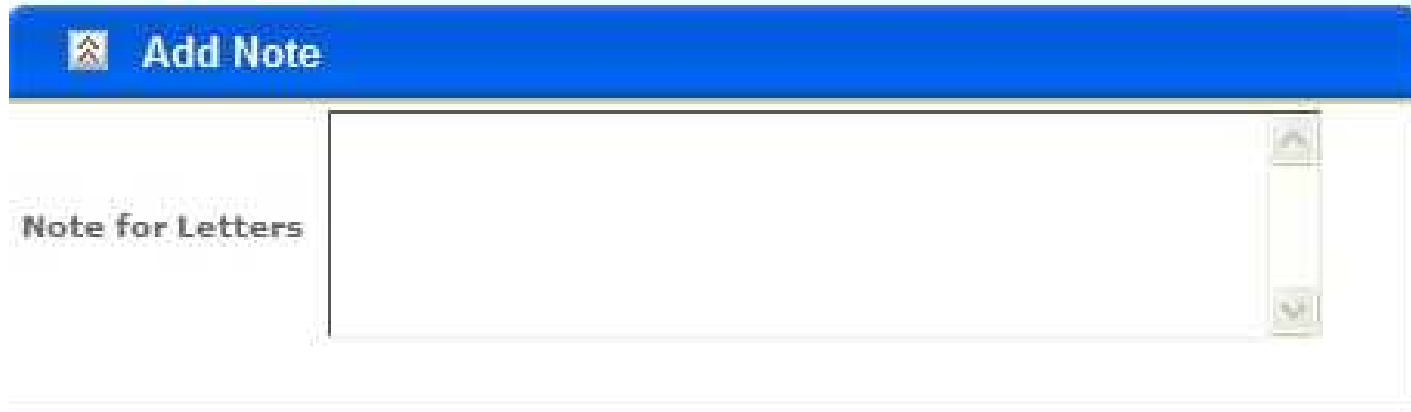
Additional Terms required for the selected Insurance Rqmt Category are listed. You can add new terms or delete terms on the list.

# Notes For Letters – Main Screen



The Notes For Letters screen displays the list of standard notes created for use in vendor Insurance Certificate tracking. You can set a vendor certificate as non-compliant by assigning one or more Notes For Letters. Certificates with Notes For Letters will appear in the Letters list and the Note will be printed on the letter to the vendor. This feature allows you to set your own custom non-compliance issues outside of the one's automatically tracked by the software.

## Notes For Letters – Add/Edit Screen



The screenshot shows a software interface for adding a note. At the top, there is a blue header bar with a small icon and the text "Add Note". Below the header, on the left side, is the label "Note for Letters". To the right of this label is a large, empty text area with a vertical scrollbar on its right edge, intended for entering a detailed note.

Enter a detailed Note. The note will be saved in the Notes For Letters list and will appear in the Notes For Letters drop down list in the Vendor Insurance Certificate screen for selection.

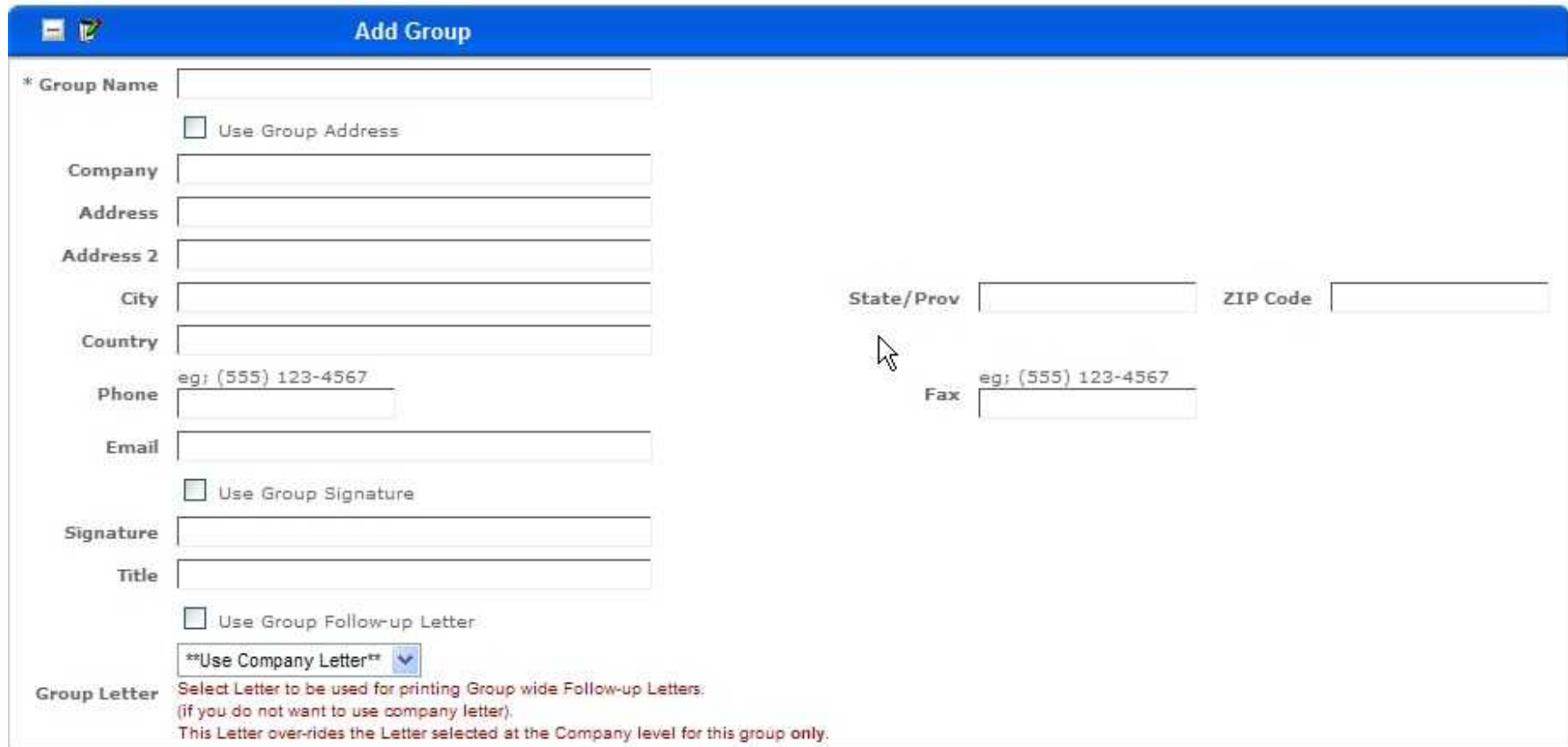
# Group – Main Screen

The screenshot shows a web application window titled "Groups". At the top, there is a search bar labeled "Search for" with a "Go" button. Below it is a "Group Name" dropdown menu currently set to "All". A toolbar contains several icons for actions like search, delete, refresh, and print. To the right of the toolbar, there is a pagination control showing "1 of 1" items, "6 Items" per page, and a "Go" button. The main content area is a table with the following data:

<input type="checkbox"/>	Group Name
<input type="checkbox"/>	Consultant
<input type="checkbox"/>	Contractor
<input type="checkbox"/>	DIV 007 SPORTSWEAR

The Group screen displays the list of Groups created for use in the Vendor screen. Assign a vendor to a Group from the Group drop down list to identify/organize vendors. Screens and reports can be filtered and sorted by Group. A Group can be anything based on your business needs. For Property Management companies, a Group could be the specific Property. For Retail companies, the Group might be a Division. Groups could be the type of Vendor such as Contractor, Subcontractor, Vendor, etc. You can have unique insurance contact information and letter templates by Group. Use of the Group field is optional.

# Group – Add/Edit Screen



**\* Group Name**

Use Group Address

**Company**

**Address**

**Address 2**

**City**

**Country**

**Phone**  eg: (555) 123-4567


**Email**

Use Group Signature

**Signature**

**Title**

Use Group Follow-up Letter

**Group Letter**  

Select Letter to be used for printing Group wide Follow-up Letters:  
(if you do not want to use company letter).  
This Letter over-rides the Letter selected at the Company level for this group only.

**State/Prov**  **ZIP Code**

**Fax**  eg: (555) 123-4567

Enter a Group Name. If your want to override the company level insurance contact information, enter the Group contact information and check the Use Group Address and/or Use Group Signature. If you want to override the company level letter template, click Use Group Letter and select the Letter Template from the drop down box (Letter templates are built in the Follow-up Letter section of the software).

# Service – Main Screen

The screenshot shows the 'Vendors Service' main screen. At the top, there is a blue header with the text 'Vendors Service'. Below the header, there is a search bar with the text 'Search for' and a 'Go' button. Underneath the search bar, there is a 'Description' dropdown menu with 'All' selected. Below the dropdown menu, there is a toolbar with various icons for search, delete, refresh, and other actions. To the right of the toolbar, there is a pagination control showing '1 of 1' items, '6 Items' per page, and a 'Go' button. Below the toolbar, there is a table with a 'Description' header and a checkbox for each row. The table contains three rows: 'Alteration Services', 'Electrical', and 'Lawn Care'. A mouse cursor is pointing at the 'Alteration Services' row.

<input type="checkbox"/>	Description
<input type="checkbox"/>	Alteration Services
<input type="checkbox"/>	Electrical
<input type="checkbox"/>	Lawn Care

The Service screen displays the list of Services created for use in the Vendor screen. Assign a Vendor to a Service from the Service drop down list to identify/organize vendors. Screens and reports can be filtered and sorted by Service. A Service can be anything based on business needs. Services could be the type of vendor service provided such as Electrical, Custodial, Food Service, etc. For Property Management companies, Service might be a mall location. Use of the Service is optional.

# Service – Add/Edit Screen



Windows-style dialog box titled "Edit Service".

\* Description: Automobile Dealers-Used Cars

Buttons: Save, Cancel

Enter the Service.

# Broker – Main Screen

The screenshot shows the 'Insurance Broker' main screen. At the top, there is a blue header with the text 'Insurance Broker'. Below the header, there is a search area with a 'Search for' text box and a 'Go' button. Underneath, there are two dropdown menus: 'Broker' set to 'All' and 'Contact' set to 'All'. A toolbar contains various icons for file operations and navigation. Below the toolbar, a pagination bar shows '1 of 1' items, '2 Items', and a '50' page size selector. The main content is a table with the following data:

<input type="checkbox"/>	Broker	Contact	Phone	Email
<input type="checkbox"/>	Hills Agency	John Smith	200-555-1212	jsmith@hillsagency.com
<input type="checkbox"/>	Penbrook Insurance Group	Janice Long	610-555-2233	jlong@penbrookins.com

The Broker Screen displays the list of Brokers created for use in the Vendor screen. Assign up to 3 Brokers to a Vendor Insurance Certificate from the Broker drop down lists. Use of the Broker field is optional.

## Broker – Add/Edit Screen



Edit Insurance Broker	
* Broker	Hills Agency
Contact	John Smith
Title	Account Rep
Address 1	222 Main St
Address 2	
City	Birmingham
State	AL
ZIP Code	43211
Country	
Phone	200-555-1212
Fax	
Email	jsmith@hillsagency.com

Enter the Broker company. Contact name, address, phone and email are optional. Future releases of iFastrack will allow you to send custom letters to the broker as part of insurance certificate tracking. Use of the Broker field is optional.

**End of  
Tutorial**