

iFastrack v8.09 Tutorial

Insurance Certificates

This tutorial provides an overview of iFastrack Insurance Certificate data entry.

Insurance Certificate Menu Screen



Existing certificates can be accessed from the Certificates/Documents drop down menu.

Insurance Certificate Search Screen

Search Certificates

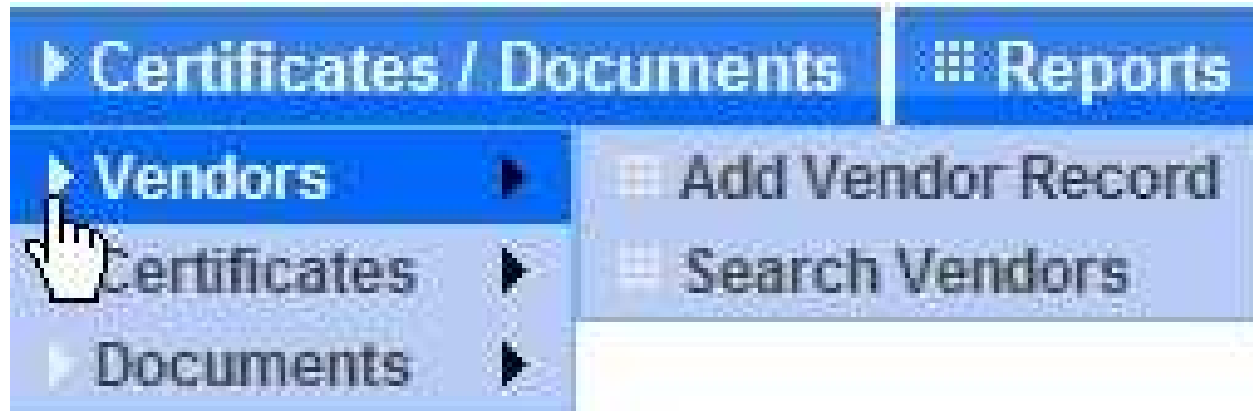
Vendor	All	Search Vendor	<input type="text"/>
Group	All	Search Group	<input type="text"/>
Service	All	Search Service	<input type="text"/>
Xref	All	Search Xref	<input type="text"/>
Certificate	All	Search Certificate	<input type="text"/>
Cert Ref	All	Search Cert Ref	<input type="text"/>
Cert Status	All		
Category	All		
Ins Status	All		

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5 Items
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Go

	Vendor	Xref	Certificate	Document #	Category	Group	Service	Last Letter	Cert Ref	Ins Status	Cert Status
<input type="checkbox"/>	Landow Construction Company		General	None	Standard	Unit 15	Construction	10/30/2008		Ok	Active
<input type="checkbox"/>	Martin's Landscaping	P4566	General	2010-001	Standard	Unit 10	Lawn Care	4/20/2010		Expired	Active
<input type="checkbox"/>	Simpson and Company		General	None	Standard	Unit 10	Electrical	4/20/2010		Soon to Expire	Active
<input type="checkbox"/>	Williams Washing Co		Site 100	P124408	High 1	Unit 22	Maintenance	4/20/2010	240 Washington Circle	Missing	Active
<input type="checkbox"/>	Williams Washing Co		Site 190	P08644	High 1	Unit 22	Maintenance	10/30/2008	89 Park Place	Inadequate Limits	Active

This screen displays all insurance certificates entered for all active Vendors. Locate certificates through the drop down filters or the Search options. Certificates can be edited, deleted and viewed from this screen. Summary information is displayed for each certificate including Vendor, Certificate name, Document # (if certificate is tied to a document), Insurance Rqmt Category, Group, Service, Xref, Last Letter, Insurance Status summary and Certificate status.

iFastrack Menu Screen



Certificates can also be accessed through the Vendor screen. New certificates can only be added from the Vendor screen. To add a certificate, first edit the Vendor and then click on the Certificate Tab.




Vendor Screen

Certificates Tab

Notes Certificates Documents Attachments Letter History

Certificates

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	<input type="checkbox"/>	Certificate	Document #	Cert Reference	Rqmt Category	Ins Status	Ins Status Detail	Notes	Cert Status	Last Letter
   	<input type="checkbox"/>	Site 100	P124408	240 Washington Circle	High 1	Missing	Auto Liability - Missing General Liability - Expir...	The Vendor has 15 subcontractors on this site.	Active	Ltr6643-679.Pdf
   	<input type="checkbox"/>	Site 190	P08644	89 Park Place	High 1	Inadequate Limits	Auto Liability - Inadequate Limits Inadequate Canc...		Active	Ltr6644.Pdf

The Vendor - Certificates tab displays all insurance certificates for a selected vendor. Add, edit, delete and view a specific certificate for the vendor. Summary information is displayed for each certificate including Certificate name, Document # (if certificate is tied to a document), Cert Reference, Insurance Rqmt Category, Insurance Status summary and detail, certificate notes, status and PDF image of last follow-up letter sent.

Vendor Screen

Add Certificate



The screenshot shows a software interface titled "Add Certificate". The form contains the following fields and controls:

- * Certificate**: A text input field.
- * Rqmt Category**: A dropdown menu with the text "** Please Select **" and a downward arrow.
- Cert Status**: A dropdown menu with the text "Active" and a downward arrow.
- Cert Reference**: A text input field.
- Notes**: A large text area with a vertical scrollbar.
- COI Date**: A date input field with a calendar icon to its right.

The Add Certificate screen is the first part to creating an insurance certificate record for a Vendor. Enter a Vendor unique Certificate name such as Main or Primary if only tracking one certificate per vendor, otherwise enter a identifying term such as the Project number, Property location or Job number to easily describe what the certificate applies to. Select the Insurance Rqmt Category the certificate coverage must meet. The default Cert Status is 'Active'. Cert Reference is an optional field to enter custom data. Enter unlimited internal notes for each certificate and the COI Date from the Acord Form. Once the Certificate is Saved, the Edit Certificate screen appears for entering the Policy and Additional Terms information.

Certificate Screen

General Certificate Information

The screenshot displays the 'Edit Certificate' interface. The form is organized into two columns. The left column contains fields for Certificate name (Site 100), Document # (P124408), Cert Reference (240 Washington Circle), Rqmt Category (High 1), COI Date (empty), Broker (dropdown), Letter Copies (cc) (dropdown), and Notes (text area). The right column contains fields for Cert Status (Active), Ins Status (Missing), Letters Sent (3), Date Printed (4/20/2010), and Last Letter (Ltr6643-679.Pdf). Below the form are 'Save' and 'Cancel' buttons, and a navigation bar with tabs for Policies, Additional Terms, Attachments, Notes for Letters, A.M. Best Ratings, Letter History, and Certificate Status.

Certificate	Site 100	Cert Status	Active
Document #	P124408	Ins Status	Missing
Cert Reference	240 Washington Circle	Letters Sent	3
Rqmt Category	High 1	Date Printed	4/20/2010
COI Date		Last Letter	Ltr6643-679.Pdf
Broker	** Please Select **	** Please Select **	** Please Select **
Letter Copies (cc)	** Please Select **	** Please Select **	** Please Select **
Notes	The Vendor has 15 subcontractors on this site.		

Save Cancel

Policies Additional Terms Attachments Notes for Letters A.M. Best Ratings Letter History Certificate Status

The Certificate screen contains general information about the certificate including Certificate name, Document # (if tied to a document – see document section), Cert Reference (an open field for custom data), Rqmt Category (sets insurance requirements for the certificate), COI Date, Brokers, Letter Copies (cc), Notes, certificate status, insurance status summary (most severe status) and non-compliance letter information including letters sent (resets to 0 once insurance status is OK), date last letter sent and PDF image of the lette. All fields are optional except Certificate name and Rqmt Category.

Certificate Screen

Policies Tab

Policies Additional Terms Attachments Notes for Letters A.M. Best Ratings Letter History Certificate Status												
<input type="checkbox"/> <input type="checkbox"/> 1 of 1 3 Items 25 / Page Go												
<input type="checkbox"/>	Policy	Req'd	Rcv'd	Expires	Limit 1	Limit 2	Limit 3	Comb w/XS	Skip Policy	Skip Limits	Policy Status	
<input checked="" type="checkbox"/>	Auto Liability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	Combined Single Limit \$0,000	Property Damage \$0,000	Bodily Injury \$0,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Missing	
<input checked="" type="checkbox"/>	General Liability	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3/15/2010	Each Occurrence \$3,000,000	General Aggregate \$3,000,000	Product Comps \$3,000,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Expired	
<input checked="" type="checkbox"/>	Workers Comp	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11/30/2010	Each Accident \$1,000,000	Disease Each Employee \$1,000,000	Disease Policy Limit \$1,000,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Policy 0	

The policies tab displays policies associated with the certificate. When an Insurance Rqmt Category is selected during the initial addition of a certificate the required policies and additional terms are added to the certificate record and checked as required. If needed, add other policies and designate whether they are required. Only policies set as required are tracked for expirations and limits. Note that if Combine with Excess is selected for a policy when building the insurance requirement category, the Excess policy is automatically added as not required to allow for easy entry of Excess coverage information.

Check policies as received and enter the expiration dates and limit amounts. Check 'Skip Policy' or 'Skip Limit' to make an exception and not require the policy or to accept the limits for the certificate. Policy Status shows the status prior to any changes and is updated after the Save button is clicked. The required limit amounts are also listed for each policy on the right (not displayed above).

Certificate Screen

Additional Terms Tab

<input type="checkbox"/>	Term Name	Req'd	Rcv'd	Skip Term
<input checked="" type="checkbox"/>	30 Day Notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Additional Insured	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	WC Waiver of Subrogation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Additional Terms tab displays the additional terms associated with the certificate. When an Insurance Rqmt Category is initially selected the additional terms are added to the certificate record and checked as required. If needed, add additional terms and designate whether required. Only terms set as required are tracked.

Check the additional terms as received. Check 'Skip Term' to make an exception and not require the term for the certificate.

Certificate Screen

Attachments Tab

Policies Additional Terms **Attachments** Notes for Letters A.M. Best Ratings Letter Hi

User All

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<input type="checkbox"/>	Description	Date Added	User	File Size	Attachment
<input checked="" type="checkbox"/>	Insurance Certificate	1/23/2008 12:00 AM	Administrator	386,358	Acord Form.pdf

Each vendor certificate can have unlimited attachments in multiple formats (jpg, pdf, bmp, doc, xls, wav, wmv). Attachments are copies of the original file and saved in the iFastrack directories. Click on the Attachment file name to view an attachment.

Certificate Screen

Notes for Letters Tab

Policies		Additional Terms		Attachments		Notes for Letters		A.M. Best Ratings		Letter History	
						1 of 1		25 / Page		Go	
<input type="checkbox"/>	Note										
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Carrier is unacceptable:		<input type="button" value="v"/>	<input type="button" value="📄"/>						

Note for Letters allows the user to select one or more custom notes to be printed on the non-compliance follow-up letter. If a Notes for Letters exists, the insurance certificate is tagged as non-compliant and the note must be deleted once the situation is remedied. Notes can be added to the selection available through Data Maintenance or by clicking the Add icon next to the notes box.

Certificate Screen

A.M. Best Ratings Tab

Policies	Additional Terms	Attachments	Notes for Letters	A.M. Best Ratings	Letter Hi
Minimum required A.M. Best Rating: A+					
<div style="display: flex; justify-content: space-between; align-items: center;"> <input type="text" value="1"/> of 1 <input type="button" value="2 Items"/> / Page <input type="text" value="10"/> <input type="button" value="Go"/> </div>					
	<input type="checkbox"/> Insurance Company	Naic	Rating	Financial Code	Effective Date
	<input type="checkbox"/> Acceptance Insurance Company	37958	NR-1		6/19/2007
	<input type="checkbox"/> Chubb Indemnity Insurance Company	12777	A++g	XV	10/4/2006

Carriers can be selected and added from the imported AM Best Ratings file (see System Utilities). Ratings are then compared against the Minimum rating set in the Company record (see System Maintenance). Ratings below the minimum are tagged as non-compliant.

Certificate Screen

Letter History Tab

Policies Additional Terms Attachments Notes for Letters A.M. Best Ratings Letter History

User All

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<input type="checkbox"/>	Printed	User	Letter Data
<input checked="" type="checkbox"/>	4/20/2010 7:38 AM	precca	Ltr6643-679.Pdf

The Letter History tab displays a list of all letters sent to the vendor for Insurance Certificate non-compliance notification.

Certificate Screen

Certificate Status Tab

Policies	Expirations	Limits	Additional Terms	Notes for Letters	Ratings
Auto Liability - Missing	General Liability - Expired on 03/15/2010	Ok	WC Waiver of Subrogation - Missing	Carrier is: unacceptable.	Insurance Carrier Acadia Insurance Company has an unacceptable rating of A

The Status Tab displays the Insurance Status detail including Missing Policies, Policy Expirations (expired and soon to expire), Inadequate Limits, Missing Additional Terms, Notes for Letters and A.M. Best ratings status.

**End of
Tutorial**