



## Insurance Certificate Tracking and Contract Management Software iFastrack© - Web Version Feature Highlight Sheet

### **SYSTEM TECHNOLOGY**

Web based software you install on your web server  
.Net technology  
SQL Server databases  
Excel files for importing/exporting data  
Microsoft Word letter templates  
Crystal reports in PDF formats

### **FUNCTIONALITY**

Vendor can have unlimited insurance certificate and document (agreement) records  
Ability to import vendor and insurance certificate data using Excel files  
OCR scanning of ACORD forms available as Add-on  
Three user defined fields (Group, Service, Xref) to organize/identify vendors for filtering/sorting screens and reports  
Unlimited attachments at Vendor, Certificate and Document levels  
Freeform vendor notes  
History of all letters sent to Vendor  
Password access with multiple levels of user rights and company level access rights  
Program setup screen to assign system defaults  
Comprehensive insurance certificate and document tracking reports

**Insurance Certificate Tracking**

- Custom Insurance Requirement Categories used to set vendor certificate policy, limit and additional terms requirements. Each category can have unlimited policies and additional terms.
- 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 follow-up letters containing detailed list of non-compliance issues (includes envelopes or labels)
- Letter templates customizable using Microsoft Word mail/merge protocols
- Reminder letter sent after 30 days (days between letters a user defined period)
- History of all letters sent
- Unlimited attachments
- A.M. Best Rating Check

**Document/Contract Management**

- Can be used to track any type of document or agreement (contract, lease, loan)
- Tracking for document approval date, start 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 Document. Each action item contains:
  - Item number and description
  - Due date, Completion date and Tracking Date
  - Amount added and amount paid
  - Freeform notes.
- Link between the contract and insurance certificate (as needed)
- Unlimited attachments