

Insurance Certificate Tracking and Contract Management 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
- ◆ Insurance certificate can be tied to a document
- ◆ 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 at certificate level
 - ◇ 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 at contract level