

Getting Started

*Certificate Name:

*Vendor:

General Liability Expirat

Umbrella Expiration Dat

Automobile Expiration D

Worker's Comp Expiratio

Other Expiration Date:

Attachments

Risk Management Center

Manage Your *Certificates of Insurance* to Prevent Unexpected Liabilities with COI Track®

COI Track streamlines certificate of insurance management to ensure you minimize risk by maintaining up-to-date vendor records. Avoid the liability from uninsured or under-insured vendors, contractors, suppliers or tenants.

- Ensure Coverage Limits Meet Your Requirements
- Track and Monitor Policy Expiration Dates
- Automatically Notify Non-Compliant Vendors
- Automatic Reporting to Provide You with Complete Documentation
- Generate Needed Analysis by Vendor, Project or Location
- Scan in ACORD 24 Forms With Optical Character Recognition
- Address a Critical, but Often Overlooked, Risk Management and Loss Control Discipline

Use COI Track to:

- Prevent significant potential liabilities
- Save time and improve accuracy
- Streamline vendor relations
- Document and demonstrate compliance required by your insurance carrier

Holistic Solution

COI Track has full reporting capabilities to provide you with the complete documentation required by your insurance carrier.

COI Track is part of the KPA Risk Management Center, a comprehensive suite of insurance risk management, workplace safety and compliance software tools.



MORE INFORMATION

To learn more, or sign up for a no-obligation webinar, contact your platform provider or KPA Client Services at **503-766-6063** or **software.support@succeedms.com**. You can also watch a Risk Management Center overview video - <https://kpartnerresources.com/videos/>

Tools to Enhance Your Compliance



COI Track

Manage the Certificate of Insurance (COI) process and ensure your business is protected from unexpected liability.



Incident Track

Report claims and reduce incidents. Track employee injuries and related time off of work, conduct incident analyses, and run OSHA 300 Logs.



SDS Track

Comply with the new Globally Harmonized System.



Audit Track

Create audits, surveys, questionnaires, and self-assessments.



HR Essentials

Achieve HR compliance, enabled through online educational materials, an HR & Benefits library, and access to on-demand experts.



BBS Track

Cultivate a safety culture throughout your organization with a Behavior-Based Safety (BBS) Program. Ensure employees are doing their jobs safely.



Safety Observation Track

Perform and track safety observations and demonstrate job compliance.



Job Description Track

Build job descriptions that clearly communicate employee responsibilities and job-related health and safety requirements.



Training Track

Automate your entire employee training process. Schedule, track, and document training with a database of training titles.



Online Risk Management Library

Access a multitude of bilingual risk management documents and resources.



Loss Control Inspection Services

Attain certified experts to analyze current workplace conditions and environmental waste disposal programs, conduct on-site training, and assist with the management, tracking, and reporting of compliance issues.

Let's get in touch. For more information, please contact:

Name:

Title:

Company:

Phone Number:

Email:

Website: