



CoreCOI

Cloud Platform

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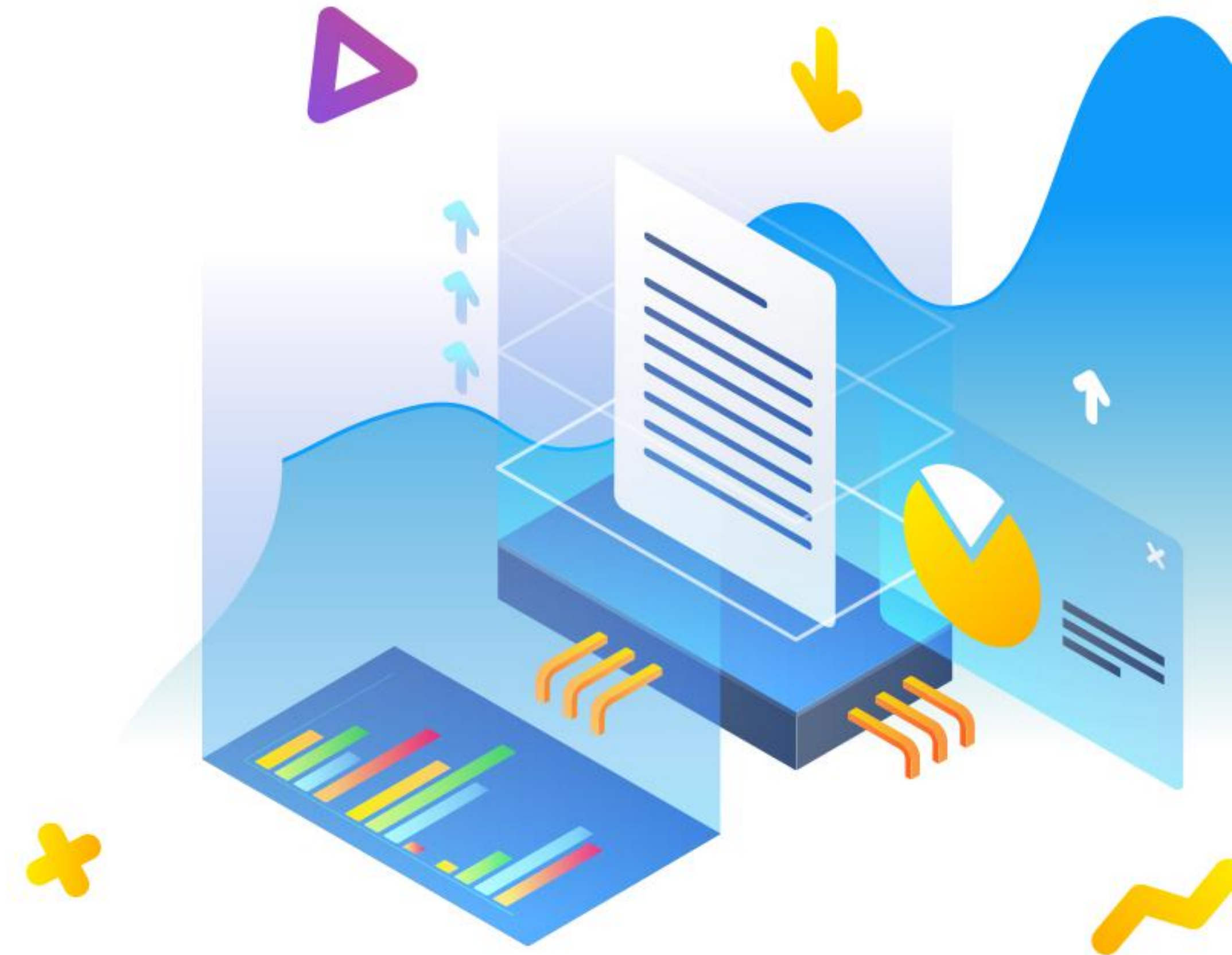
01

What is CoreCOI

Claims and lawsuits can cost your business a fortune. If you are collecting certificates just to confirm they were received, you have no guarantee that your requirements are being met. CoreCOI is built on a foundation of insurance industry logic to ensure you are protected with the a proper coverage.

There's no need to worry about stacks of COIs cluttering up your office desk or hours of frustrating phone calls and emails to chase down certificates. CoreCOI provides your company with a solution to automate everything from your insurance certificate requests, collection, to compliance resolution.

CoreCOI is an easy-to-use, cloud-based solution developed and supported by our team of insurance professionals.



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Benefits

For companies looking for an easier and cost-effective way to collect certificates, send automated renewal requests and confirm compliance, but still want to manage the process themselves.



Compliance Manager

Remain compliant and process certificates the smart way using our Compliance Manager. This intuitive self-processing feature provides guided assistance for making the processing of certificates simpler, faster and more accurate.



Certificate Hub

Quickly understand compliance status through an easily accessible online library of all your COIs. Take advantage of easy searching, filters, ability to download and print, from one central location, saving you time with audits and claims.



Automated Requests

Send vendors and their insurance agents automated requests for missing certificates and upcoming renewal expirations, eliminating the need to manually monitor COIs. Automate the manual and burdensome process of COI communications.



Case studies



200% Increase in Compliance



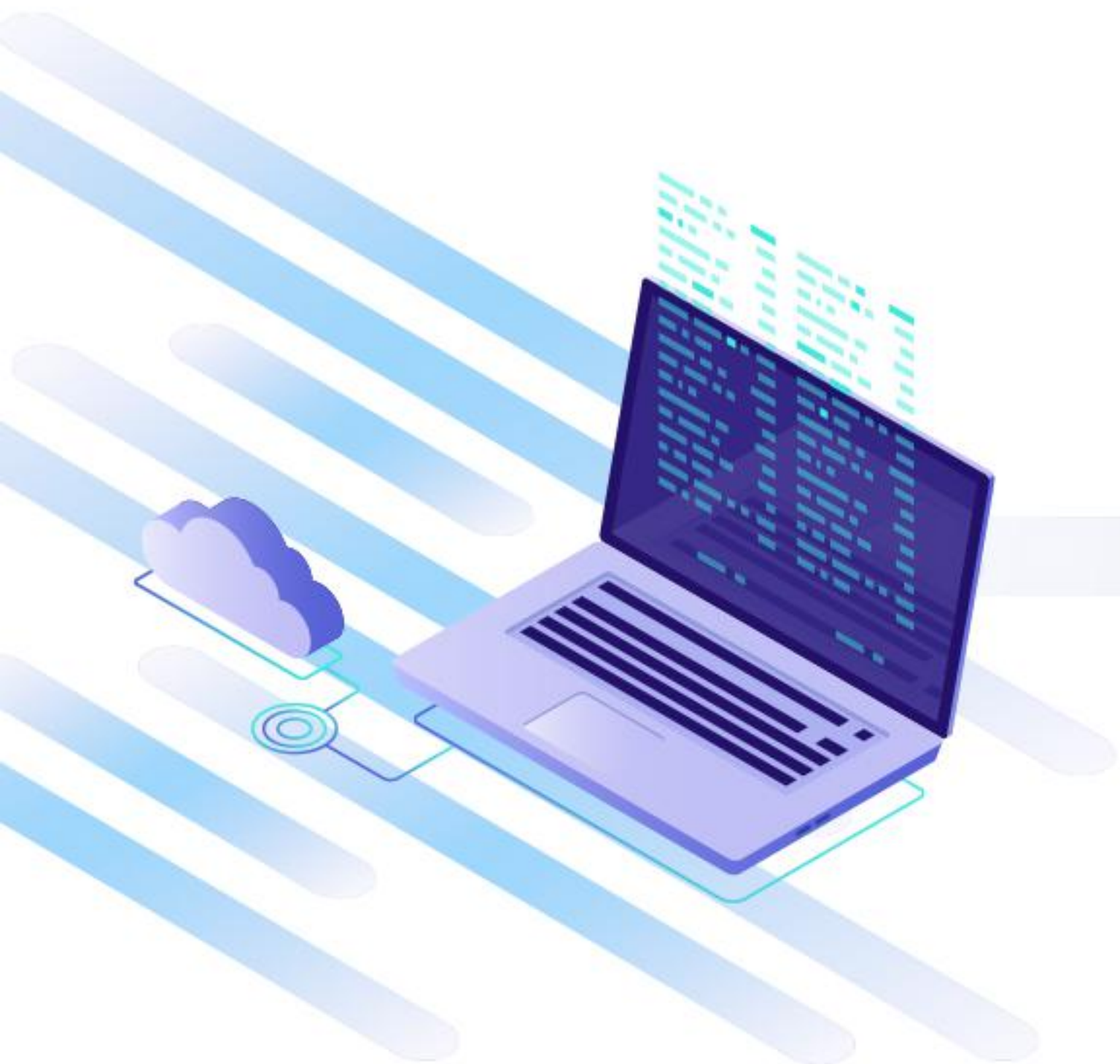
66% Reduction in cost



100% Reliance in the data

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How it works



If there are errors on the COI compliancy, the GC will be notified and a renewal request option will be presented.

STEP
04

Subcontractors will be automatically invited to create an account on CoreCOI, where they can upload the COIs requested from the GC.

STEP
02

After the COI is submitted, our automated algorithm will check if all the requirements are met and if the COI is compliant.

STEP
03

GCs add a Project on the Platform along with the Trades and Insurance Requirements. They add the awarded subcontractors to the Trades.

STEP
01

04

Services

CoreCOI delivers key benefits to simplify processing, maintenance and review. Our certificate of insurance tracking and management products and services keep you better informed, reduce filing and paper and improve accuracy. Enjoy an improved accuracy, decreased workloads, increased compliance, anytime access and a host of benefits from our apps and credentialing to state of the art certificate of insurance tracking software.



Dashboard

The CoreCOI Compliance Dashboard provides each user a customized real-time view of any and all compliance data 24/7/365. Retrieve the needed information with full search capabilities and real document imagery.



Subcontractor Portfolio

Add your subcontractor information in the system and you'll receive a compliance score for each of your subcontractors depending on their certificate compliancy percentage. Add, edit and send request directly to subcontractors for the app.



Cloud Based

There is no installation process, no software downloads and no costly hardware or maintenance. Worldwide connectivity, total information protection and unlimited data storage for insurance and document sets, reports and queries.



Easy to use

An easy to use, cloud based solution with a beautiful UI developed and supported by a professional team. CoreCOI delivers key benefits to simplify processing, maintenance and review COIs.



Collaborate & Audit

CoreCOI is a collaborative platform, allowing for updates, comments, notes and messages to be viewed, added and shared. Our intuitive platform can also retrieve historical data for auditing.



Multiple Industries

Certificate of insurance tracking and management services of CoreCOI can be used in various industries including: Construction, Property Management, Hospitality, Media Entertainment, Manufacturing, Retail.

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Your Information is Safe and Available

Our products and services are transforming the COI management and review, but the backbone of our success is providing a safe and trustworthy place for all of the data submitted on the platform. Protecting your data is our obsession.

- Sessions between you and your portal are always protected with top end in-transit encryption, advanced TLS protocols, and 2,048-bit keys.
- CoreCOI code is high quality from conception to deploy. We use automated static code analysis alongside human review to ensure development best practices are implemented across our weekly code pushes. Responsive software development means new features, resiliency improvements, and bug fixes arrive hundreds of times a day, seamlessly.
- CoreCOI uses enterprise-grade firewalling, routing, intrusion prevention, and behavior analytics capabilities to protect infrastructure and thwart attacks.
- We test for potential vulnerabilities continuously in all layers of the technology stack. Dynamic application scans, static code analysis, and infrastructure vulnerability scans are run every day, all day. Our Security team hammers our products day-in and day-out to detect and quickly respond to flaws.

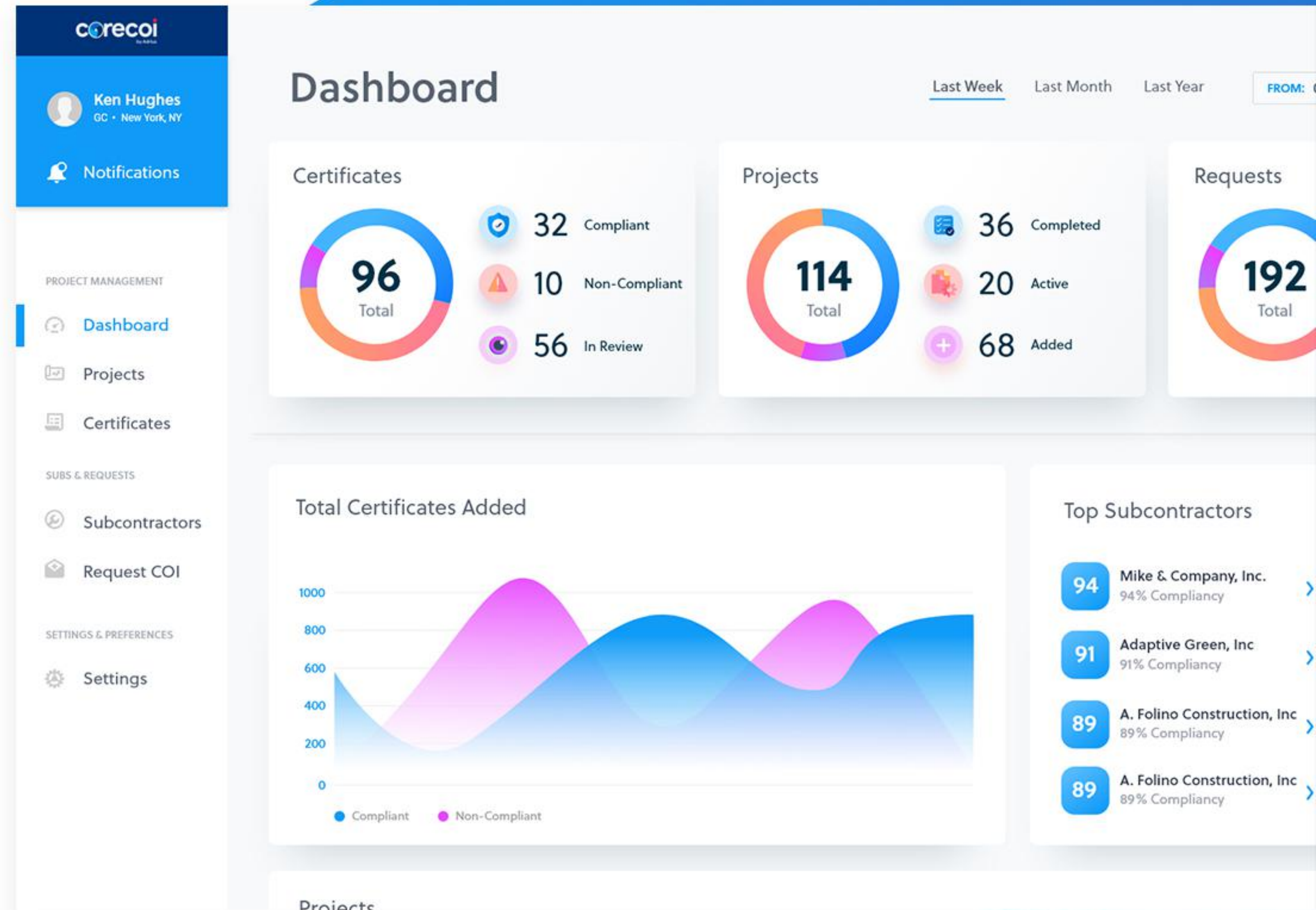


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Dashboard

Our dynamic dashboard shows all the Total Certificates tracked, compliant and other scores. All these data can be filtered by date. Other stats and charts are a constant monitor of the total Certificates added over the picked period of time, Certificate compliancy percentage with date filters, Active Jobs and details, Projects Overview that shows all the projects that are Active, Pending and Completed. On the future this dashboard will also feature a section with all the relevant data which can be customized depending on the user level.

The CoreCOI Compliance Dashboard provides each user a customized real time view of any and all compliance data 24/7/365. Retrieve the needed information with full search capabilities and actual document imagery.

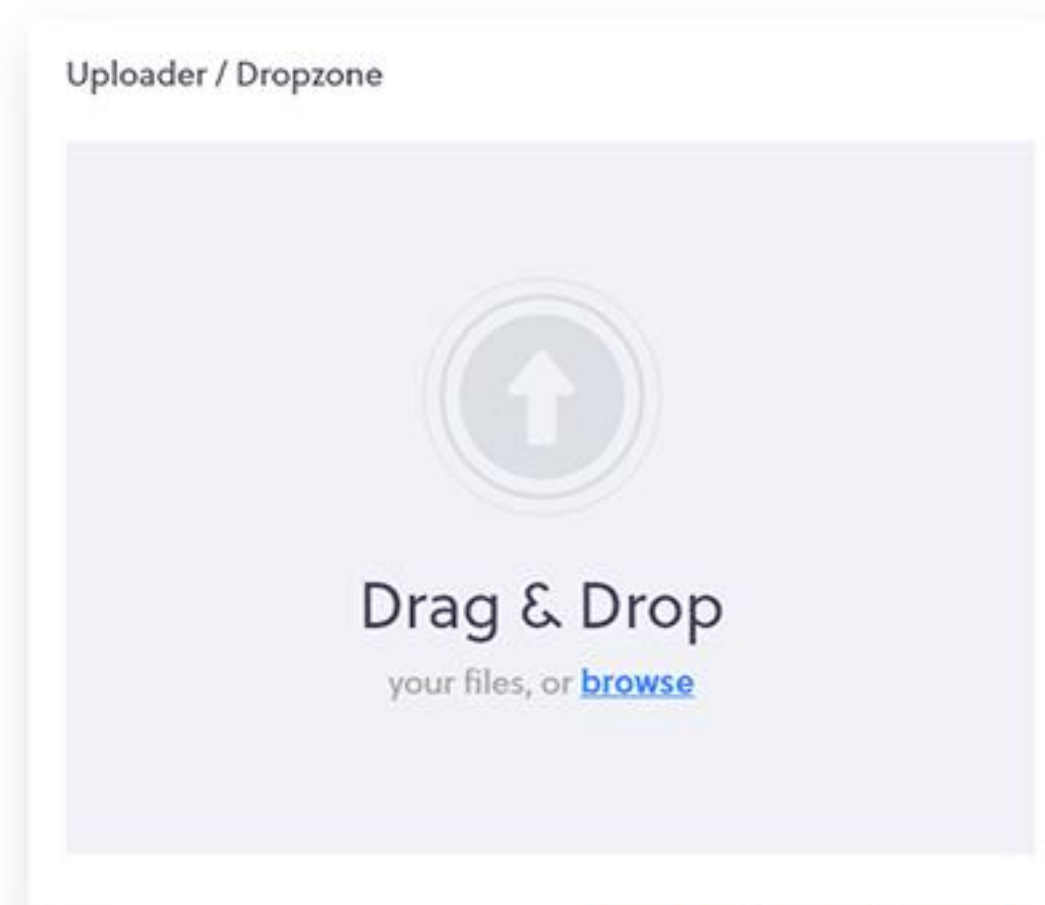


07

Projects

GCs add Projects along with the information and details. A project can store all the necessary bits of information the team needs. These data can be later changes and modified directly from this page. You can quickly see the status of a project, this way you have an overview of all the projects on the platform.

You can add files to almost anything in CoreCOI. It's really easy for GCs to e.g. add the project brief as a PDF to the project or upload insurance requirements documents for a trade using the Uploader/Dropzone developed for speed and efficiency.



Projects
Add and manage projects

225 Total Projects | 102 Active Projects | 20 Pending Projects | 103 Completed Projects

Active Pending Completed | FROM: 04-24-2018 | TO: 04-26-2018 | Search projects... | + Add New Project

Address	Status	Progress	Start Date	End Date
119-121 Spring Street	Active	48% Completed	02 Jun 2018	20 Jul 2018
74-86 19th Avenue	Pending	48% Completed	04 Jun 2018	20 Jul 2018
270-236 Bergen St	Active	48% Completed	02 Jun 2018	20 Jul 2018
43-99 Whitney St	Active	48% Completed	02 Jun 2018	20 Jul 2018

4 / page | 1 2 3 4 5

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Trades

Trades can be added after a project is created. Every trade within a project will have the insurance requirements set by the GC, awarded subcontractors and submitted COIs. You can directly request a COI from this page as well as renewal requests. Insurance Requirements can be changed and updated anytime.

After the user request a renewal from this page, the fields will be prefilled with Project Name and Trade.

The screenshot displays the CoreCOI interface for a project named "119-121 Spring Street" dated August 27, 2018. The user is Ken Hughes, GC in New York, NY. The interface is divided into a left sidebar with navigation options (Dashboard, Projects, Certificates, Subcontractors, Request COI, Settings) and a main content area. The main area has tabs for "Info" and "Trades". Under "Trades", there is a search bar and a list of trades with their completion percentages and cost codes. A table below shows subcontractors and their compliance status across various insurance categories.

Subc. Name	Commercial GL	Automobile Lb	Umbrella/XS	Workers Comp	Other
CME Group	Compliant	Compliant	Compliant	Compliant	Compliant
Daktronics	Non-Compliant	Non-Compliant	Waived	Non-Compliant	Non-Compliant
Fisker Inc.	Non-Compliant	Non-Compliant	Non-Compliant	Non-Compliant	Non-Compliant

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Certificates

This page will show all the certificates added from subcontractors. Every COI will have a status of compliancy and an option to make a request for renewal if there are COI types against the original requirements requested. This is automatically done from our algorithm that flags potential issues.

Clicking in one of the certificates on the table will reveal more details about the certificate like Producer, Insured, COI Holder, COI type and the status of the COI.

Our certificate of insurance tracking and management software keep you better informed, reduce filing and manual COI check while improving accuracy and reducing costs.

The screenshot displays the CoreCOI software interface. On the left is a navigation sidebar with a user profile for Ken Hughes (GC - New York, NY) and a menu including Dashboard, Projects, Certificates, Subcontractors, Request COI, and Settings. The main content area shows a detailed view of a certificate for '11 Park Place - Allstate - GL, XS, Auto Btek Builders LLC', which is 'Compliant (Approved)'. It lists the Producer (US Insurance Com Inc.), Insured (US Insurance Com Inc.), and COI Holder(s) (3 Certificate Holders). Below this are four summary cards for Commercial GL, Auto Lb, Umbrella/XS, and Workers Comp, each showing coverage details like General Aggregate, Claims Made, Fire Damage, Medical Expense, Personal Advertising, and Each Occurrence. A second screenshot below shows a 'Certificates' dashboard with summary statistics: 432 Total Certificates, 225 Compliant Certificates, 197 Non-Compliant Certificates, and 12 In Review Certificates. It includes filters for status (Compliant, Non-Compliant, In Review), date ranges (FROM: 04-24-2018, TO: 04-26-2018), a search bar, and a 'Request COI' button. A table below lists certificates by Subcontractor Name, Project, and status for various COI types.

Subc. Name ↑	Project	Commercial GL	Automobile Lb	Umbrella/XS	Workers Comp	Other
CME Group	119-121 Spring Street	In Review	In Review	In Review	In Review	In Review
Daktronics	74-86 19th Ave	Non-Compliant	Non-Compliant	Waived	Non-Compliant	Non-Compliant
Fisker Inc.	521-511 18th Ave	Non-Compliant	Non-Compliant	Non-Compliant	Non-Compliant	Non-Compliant
Henry Schein, Inc.	270-236 Bergen St	Compliant	Compliant	Compliant	Compliant	N/A
Harris Corporation	43-99 Whitney St	Compliant	Compliant	Compliant	Compliant	Compliant
Fisker Inc.	521-511 18th Ave	Waived	Non-Compliant	Non-Compliant	Waived	Non-Compliant

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Request COI

Requesting a COI is really easy, just choose the project and subcontractor you want to send the request to and everything else is handled by the system. The subcontractor will be notified and will get a link to upload the certificate.

In case you can't find the trade or subcontractor you are looking for, you can add it from here and continue with the process. Additional requests and comment can be added as well.

Requirement documents and other samples you add to the project will be automatically attached to the request.

corecoi

Ken Hughes
GC · New York, NY

Notifications

PROJECT MANAGEMENT

- Dashboard
- Projects
- Certificates

SUBS & REQUESTS

- Subcontractors
- Request COI**

SETTINGS & PREFERENCES

- Settings

Request COI

Request new COIs and renewals from Subcontractors

Company name
119-121 Spring Street

Trade

Choose a subcontractor

Additional requests or comments

0/150

Send Invite

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Subcontractors

GCs will have the possibility of adding Subcontractors on their portfolio. Depending on their compliancy, subcontractors will receive a score from the platform that tells how compliant is the subcontractor.

Clicking on one of the subcontractors will show all the details related to that company. A subcontractor profile contains all of the uploaded COIs, Active Jobs, Trades Awarded and Contact Persons.

The screenshot displays the CoreCOI Subcontractors management interface. The sidebar on the left includes navigation options: Dashboard, Projects, Certificates, Subcontractors (highlighted), and Request COI. The main content area shows a list of subcontractors under the 'My Subs' tab. The list is filtered by Trade: Electric, City: New York, and Compliant: All. The table columns are Name, Compliancy, Industry, Trades Awarded, COIs Uploaded, Compliant COIs, and Contact. The table contains the following data:

Name	Compliancy	Industry	Trades Awarded	COIs Uploaded	Compliant COIs	Contact
20th Century	79%	Electric	2 Trades	12 COIs Uploaded	9 Compliant COIs	+1 655 646 3038
237 Park Owner LLC	79%	Electric	2 Trades	4 COIs Uploaded	3 Compliant COIs	
321 Launch	79%	Electric	2 Trades	5 COIs Uploaded	5 Compliant COIs	
Acqui...	79%	Electric	2 Trades	6 COIs Uploaded	2 Compliant COIs	
	79%	Electric	2 Trades	7 COIs Uploaded	6 Compliant COIs	

An 'Add a subcontractor' modal window is open, showing a form with the following fields:

- Company name: Gibson Brot
- Company Address: [empty]
- ZIP: [empty]
- Phone: +1 871 567 4877
- Company email address: [empty]
- Trade: [empty]
- State: [empty]
- City: [empty]
- Add a contact person: +
- Send Invite button

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Notifications

In-app notifications are messages delivered to a user within the app while the user is directly active in the app, but if the user is not logged in, the notification will be sent as an email.

Notifications on CCM Hub show the sender information, the date and documents or links attached.

A new notification will trigger a change on the icon on the top sidebar so you are notified when there's activity on the COI statuses or when a COI is updated from your subcontractors.

The screenshot displays the CoreCOI Notifications page. At the top left, the user profile for Ken Hughes (GC - New York, NY) is shown. The main heading is 'Notifications' with the subtext 'Get notified for any activity within the platform'. A search bar for 'Search Notifications' is located at the top right. Below the heading, there are tabs for 'All', 'COIs', 'Projects', and 'Invitations', along with a 'SORT BY: Unread' dropdown menu. The notifications list on the left includes:

- New Certificate added (3 min ago): Turner Electric Co has uploaded a Certificate of Liability Insurance
- New project added (30 min ago): Lorem ipsum dolor sit amet Consectetur...
- New trade added (3 hours ago): Lorem ipsum dolor sit amet Consectetur...
- Invitation accepted (4 hours ago): Lorem ipsum dolor sit amet Consectetur...
- Certificate renewed (8 hours ago): Lorem ipsum dolor sit amet Consectetur...
- New Certificate added (22 hours ago): Lorem ipsum dolor sit amet Consectetur...
- Invitation accepted (Dec 10): Lorem ipsum dolor sit amet Consectetur...
- New trade added (Dec 2): Lorem ipsum dolor sit amet Consectetur...

The detailed view of the 'New Certificate added' notification shows:

- Turner Electric Co has uploaded a COI
- Name of subcontractor: [Turner Electric Co](#)
- Project: [119-120 Madison Square](#)
- Trade: [Electric Installation](#)
- To see the full certificate and approve it, please click on the button below
- [See certificate](#) button

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Settings

Settings tab allows the GC(owner) to manage other users and their information, set preferences for email notifications, see documentation of CoreCOI and manage the requirement templates.

Once a GC adds a user, an account will be created and a link with an invite will be sent to that user.

Settings
Manage users & set preferences

Email Notifications Turned ON

Terms of use Read terms and conditions

Privacy & Security Read privacy policy and security

Requirement Templates Trade requirements templates

Users Add user

USER INFO	CONTACT	EDIT
John Mayer GC (Owner) Mobile : 871.567.4877		
Andrey Prokopenko GC (Manager) Mobile : 871.567.4877	Phone Email	
David James GC (Manager) Mobile : 871.567.4877	Phone Email	
Valentina Salmon GC (Manager) Mobile : 871.567.4877	Phone Email	

Show More

Documentation & Help

- Projects Read more
- COI Requests Read more
- Notifications Read more
- Subcontractors Read more
- Project Requirements Read more

Read full documentation



Thank you!

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