constrafor

COI Management Tool

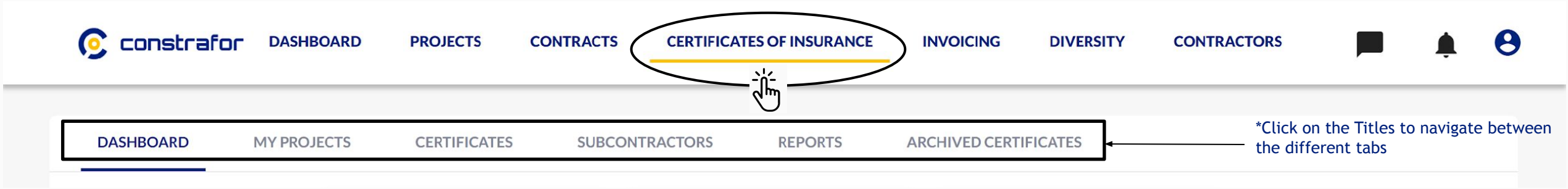
General Contractor Training Tutorial

COI Management Tool Tutorial

1. Locate COI Management Tool
2. Dashboard
3. My Projects Tab
4. Certificates Tab
5. Subcontractors Tab
6. Reports Tab
7. COI Request Lifecycle
8. User Management

1. Locate COI Management Tool

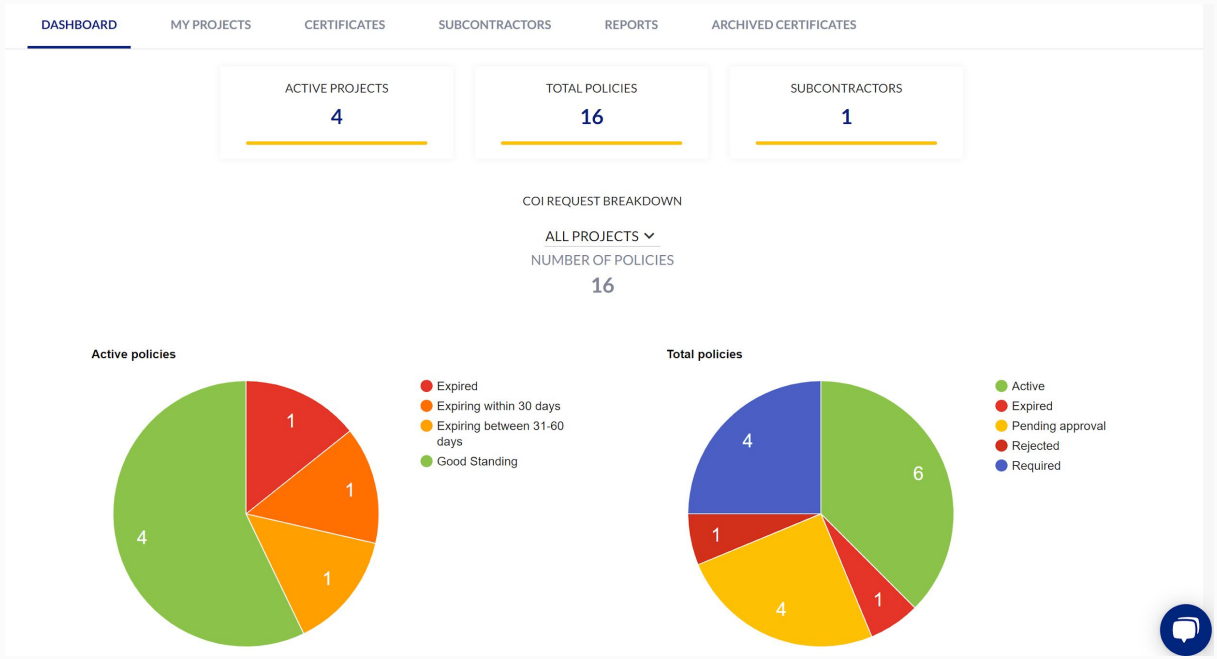
Select “Certificate Of Insurance” located at the top of the screen



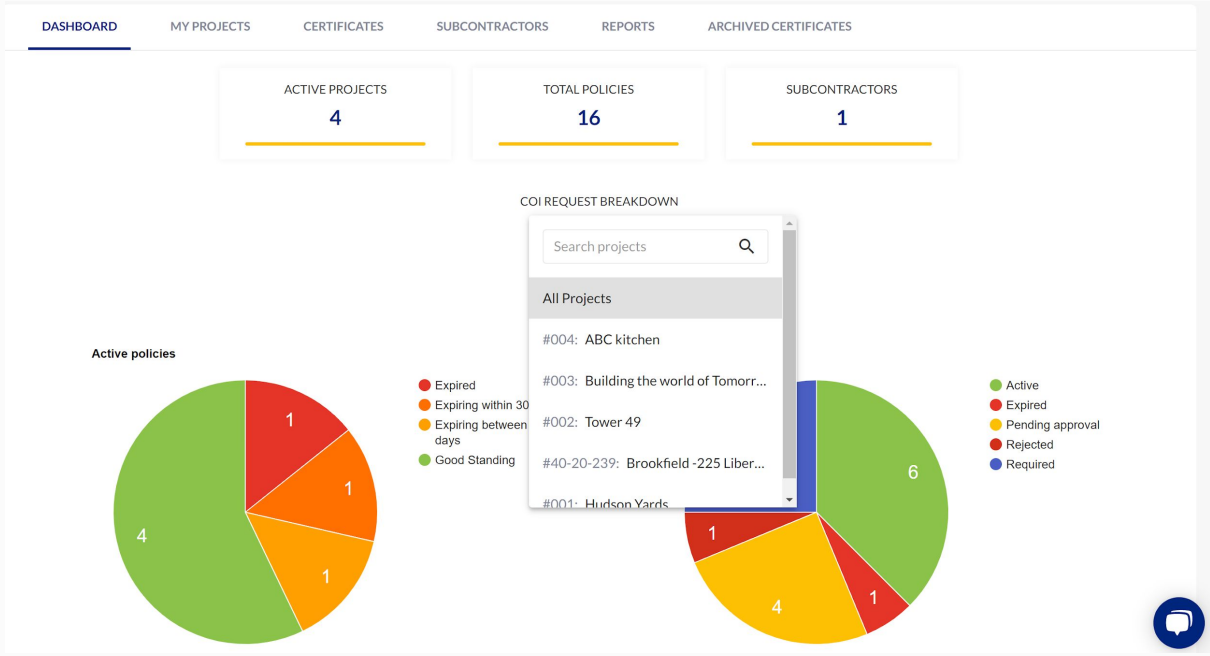
2. Dashboard

Real-time tracking of subcontractor COI compliance across your portfolio

1 Default view is for All Projects



2 Or select a project-specific view

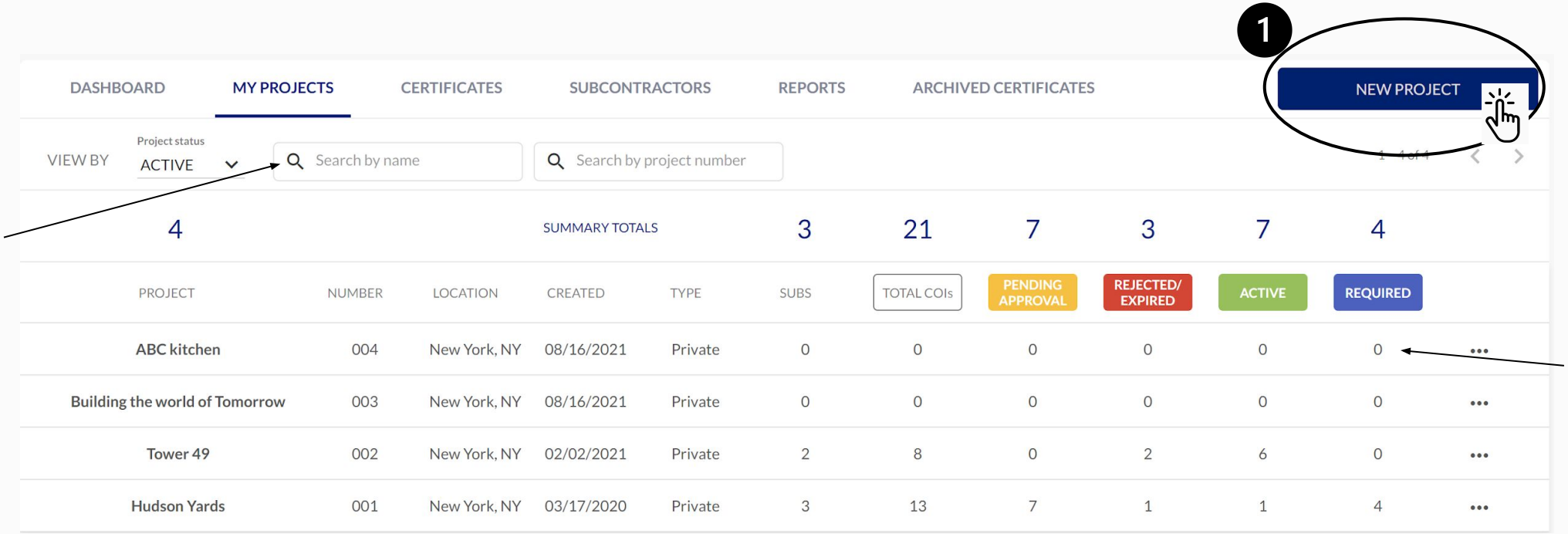


*Tip: Select pie slice to drill into the COI details

3. My Projects - Create a new project (1 of 3)

Set up a project to send COIs requests to your subcontractors

1 To create a new project, click on **"New Project"**, located in the upper right corner



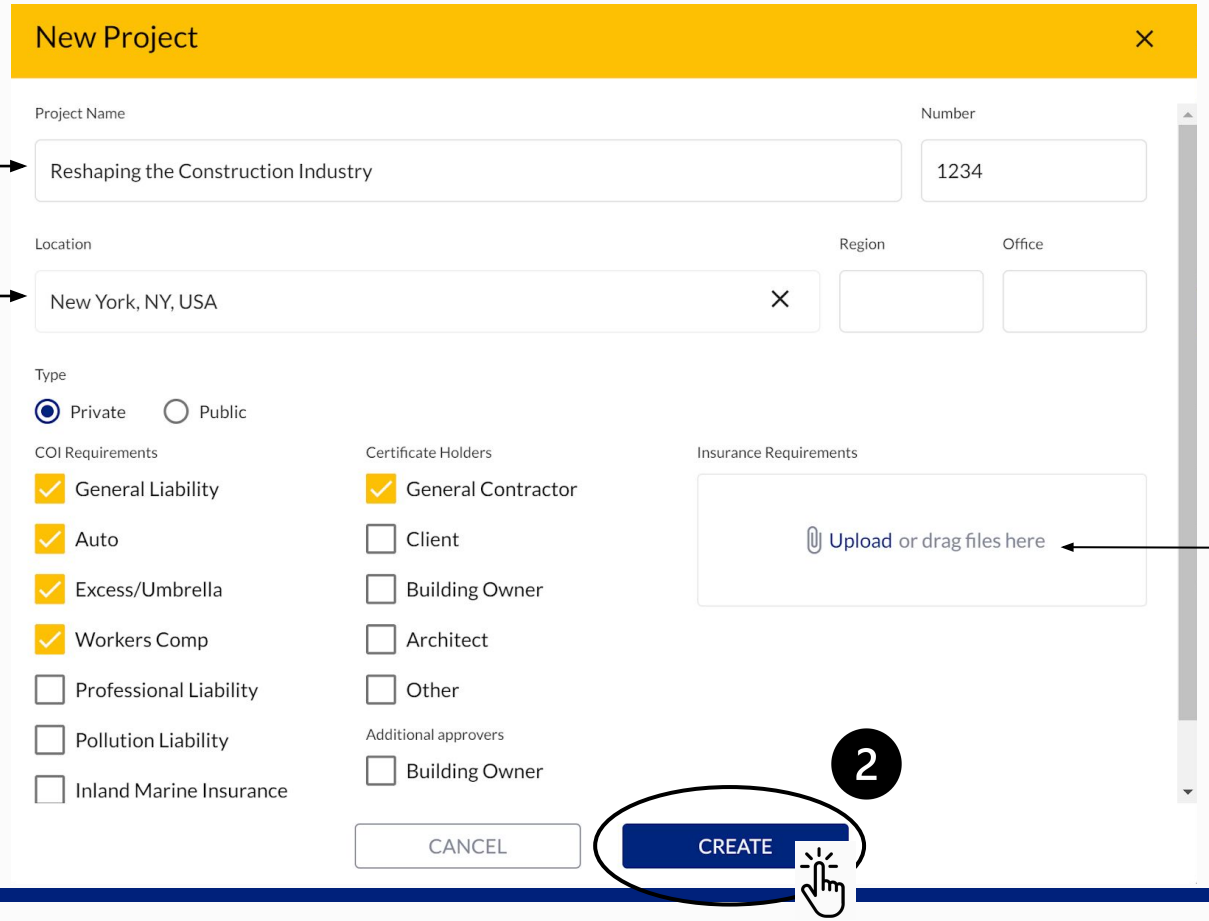
*Project name and project number search capabilities

*Snapshot count of COI status by project

3. My Projects - Create a new project (2 of 3)

In the "**New Project**" window, enter the project information, set the project specific insurance requirements, and upload the insurance requirements documents. Then, click on "**Create**" 2

*Project name and location are required fields

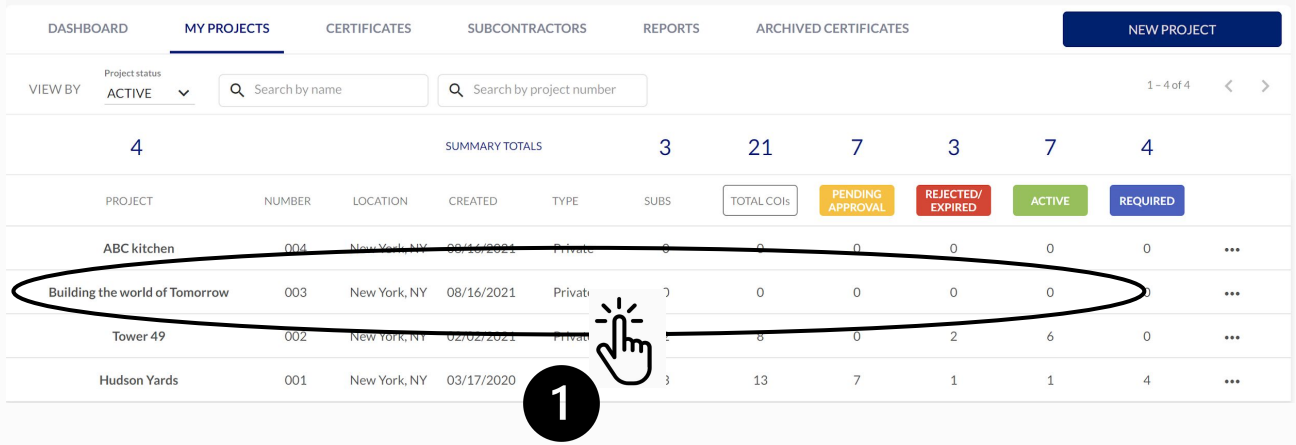


*Upload the project insurance requirements by clicking on **Upload** or dragging & dropping documents.
You can upload as many documents as you want.

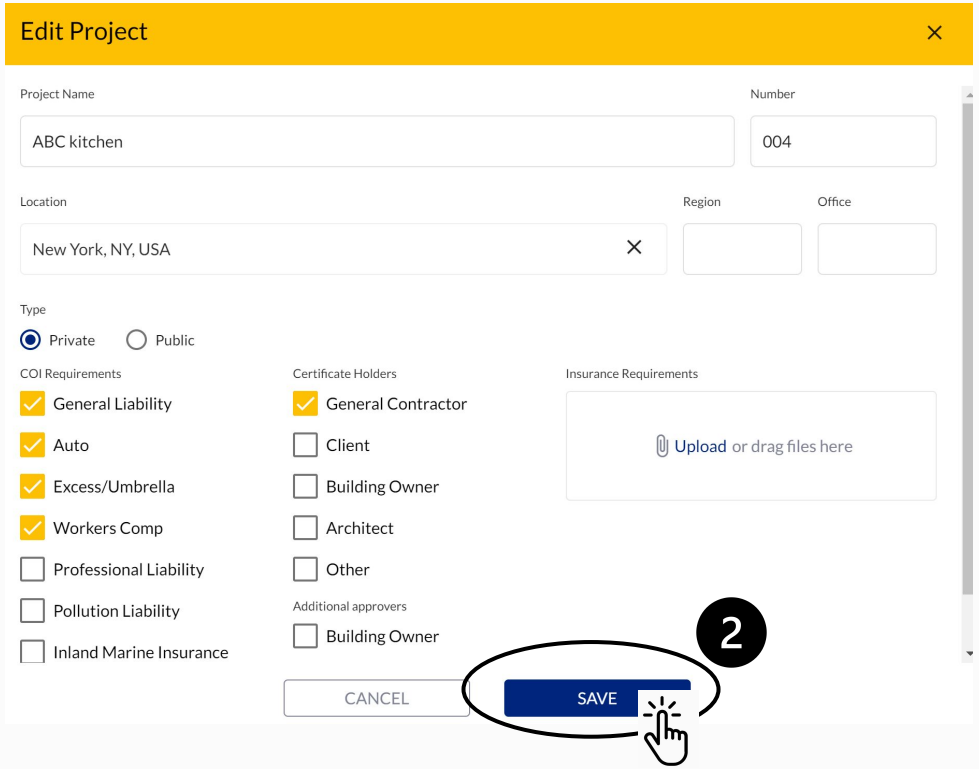
3. My Projects - Editing a project (3 of 3)

You can edit project information at any time

1. To edit an existing project, click on the project item line

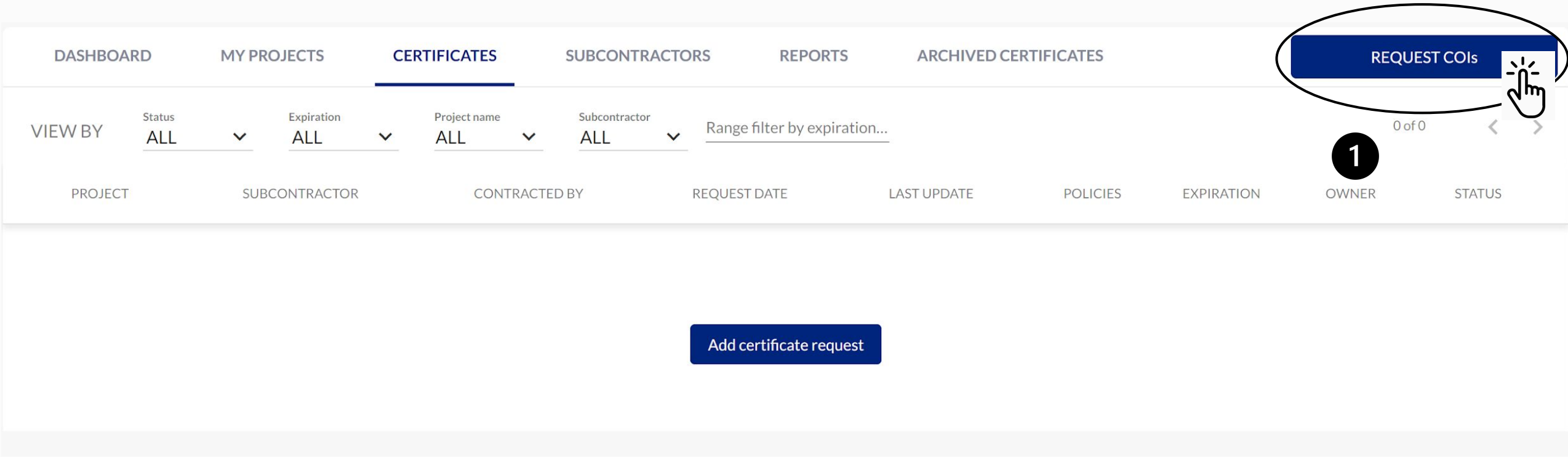


2. In the **"Edit Project"** window, edit the project information and/or insurance requirements. Then, click on **"Save"**



4. Certificates - Requesting COIs (2 of 6)

To send a new COI request, click on “**Request COIs**” 1



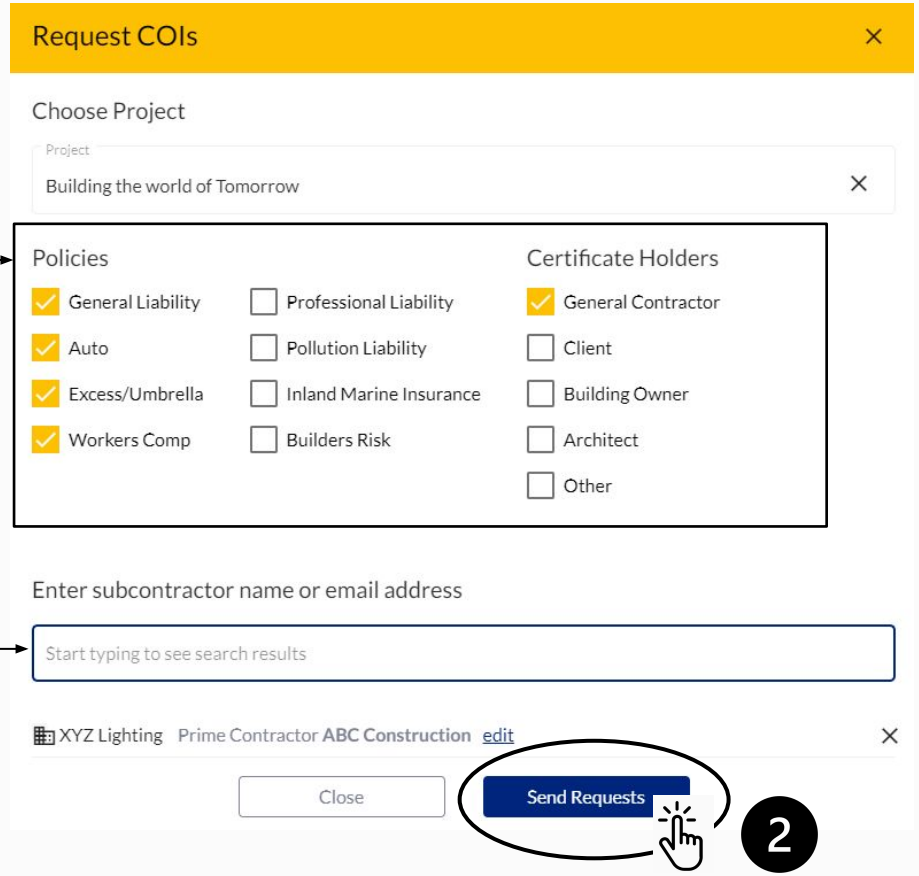
4. Certificates - Requesting COIs (2 of 6)

Select a Project, confirm the policies & certificate holders, and enter the company name(s) or email address(es). Then click **"Send Requests"**.

2

*The insurance requirements set at the project level will automatically populate. Please note, this can be modified prior to sending the COI request

*You can select multiple subcontractors to send a bulk COI request

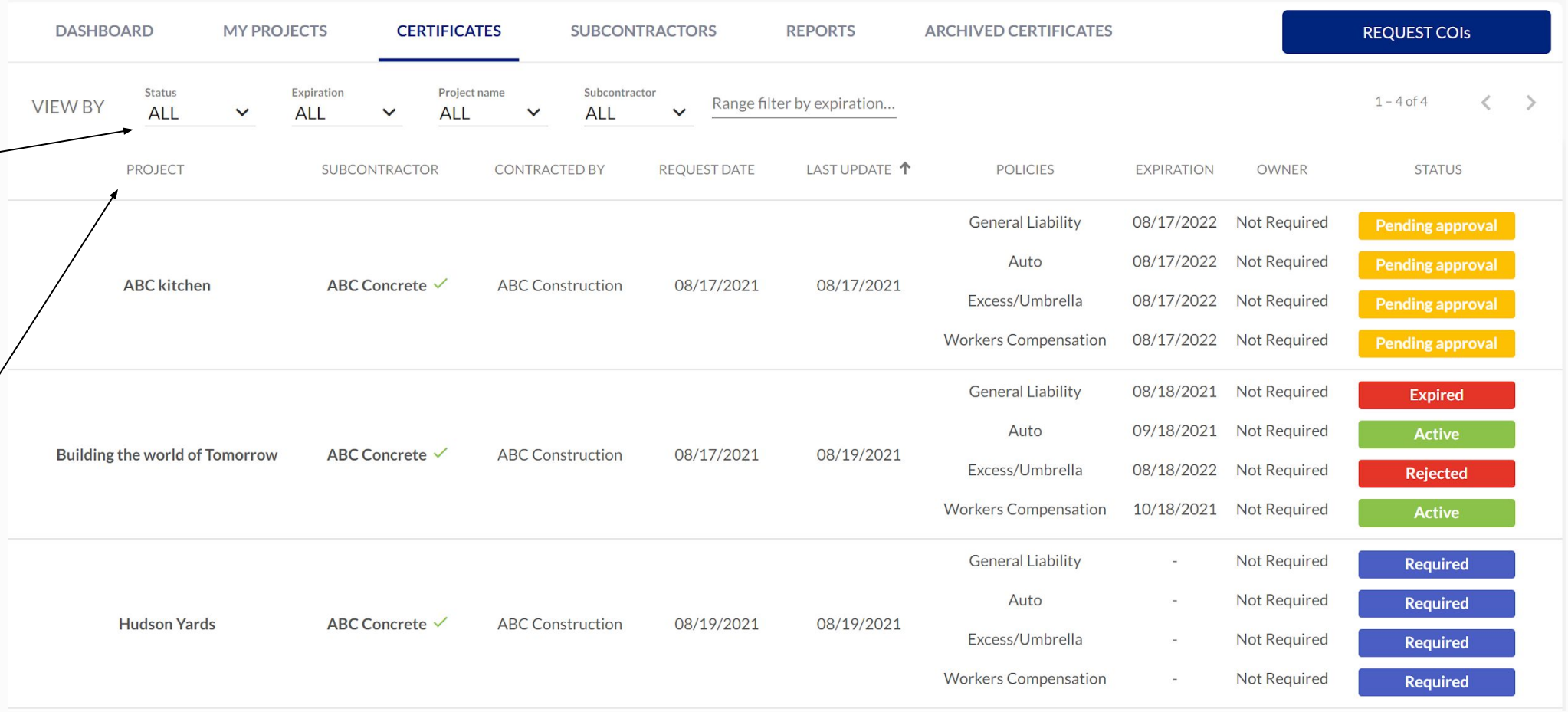


4. Certificates - Track Requests (3 of 6)

COI requests are tracked in the Certificates tab and organized by project, subcontractor, and other relevant fields for review.

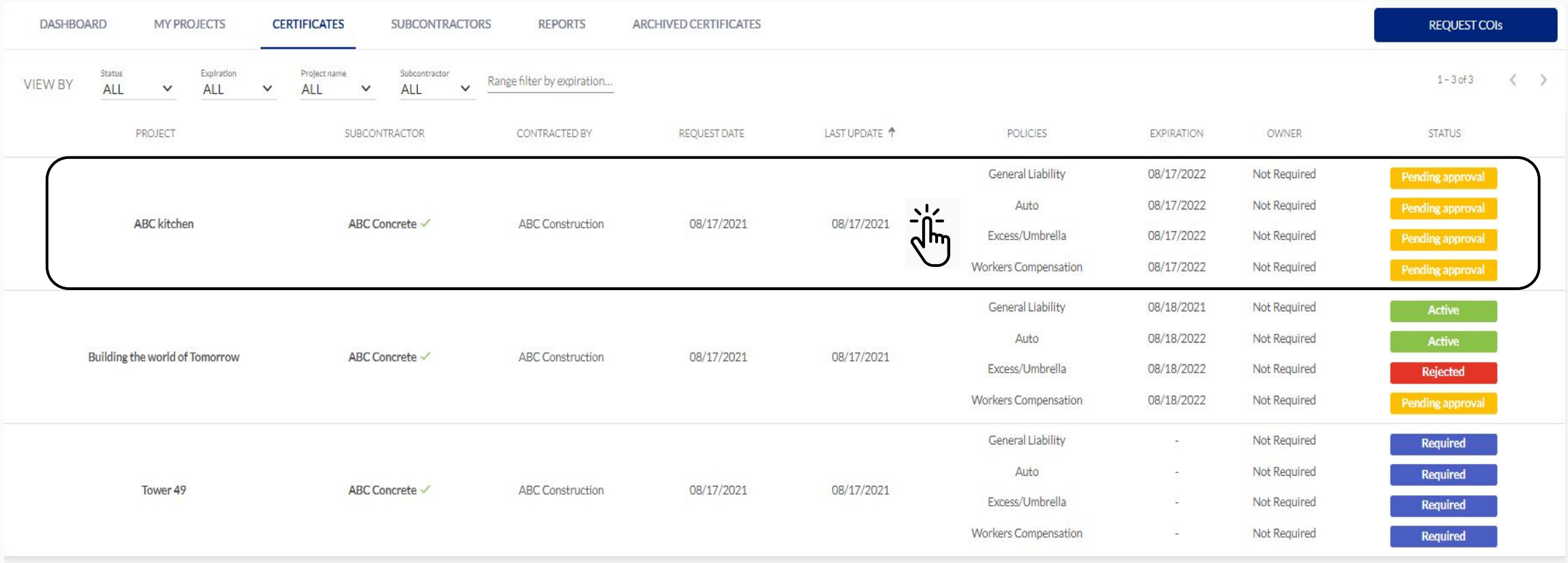
*Filters bar assists with navigating through large sums of data

*Click on Column Headers to sort the view of COI requests



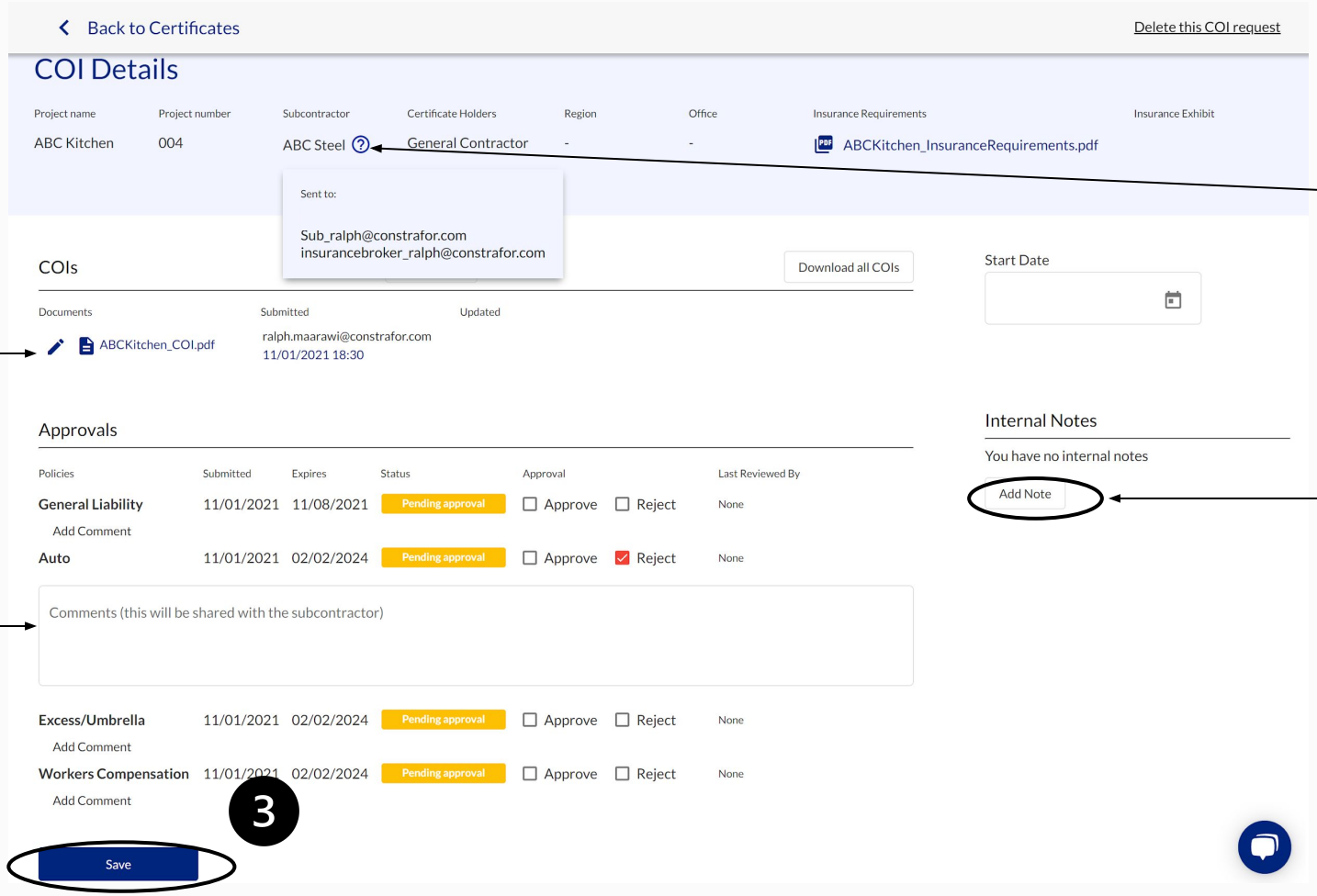
4. Certificates - Review COI Submissions (4 of 6)

Click into any row to review the COI Details Page



4. Certificates - Review COI Submissions (5 of 6)

In the COI Details page, view insurance documents submitted, and change Approval Status for each requested policy. Once complete, click **"Save"**.



1

*Click on the document uploaded by the subcontractor in order to view them on a separate tab.

2

*Review comments can be entered for each policy requested. For a rejected policy, entering a comment is a required field.

*Please note: All comments in the approvals section will be visible to the subcontractor.

*Hover over the Subcontractor name to see the COI request recipients email address.

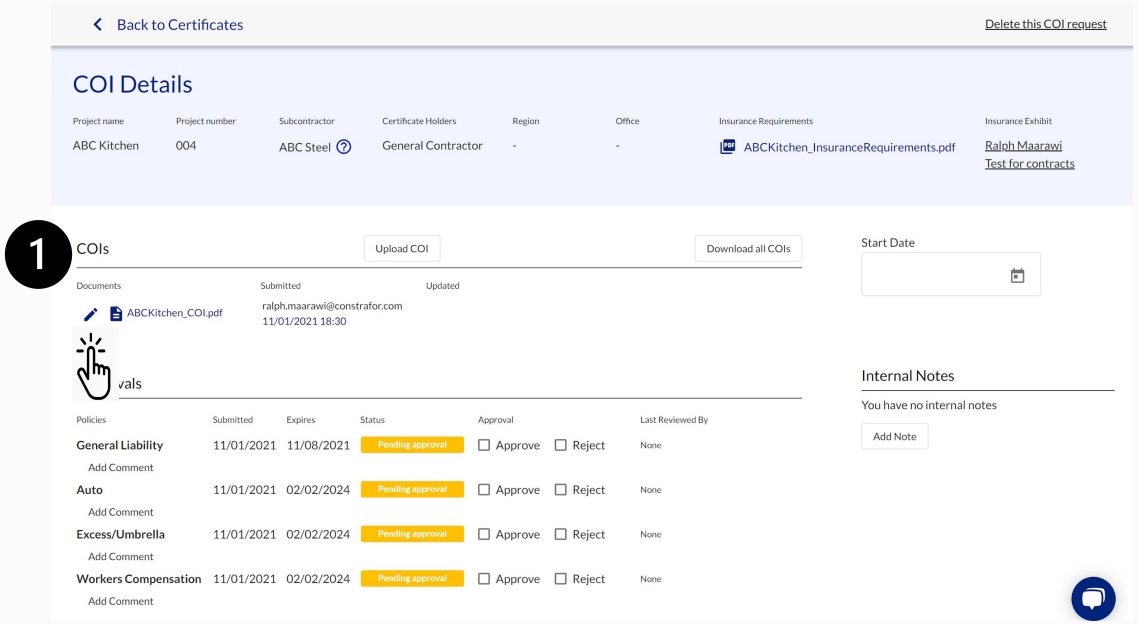
*You can add "Internal Notes" in any COI request.

Please note: These notes are meant for internal use, and they will NOT be visible to the subcontractor.

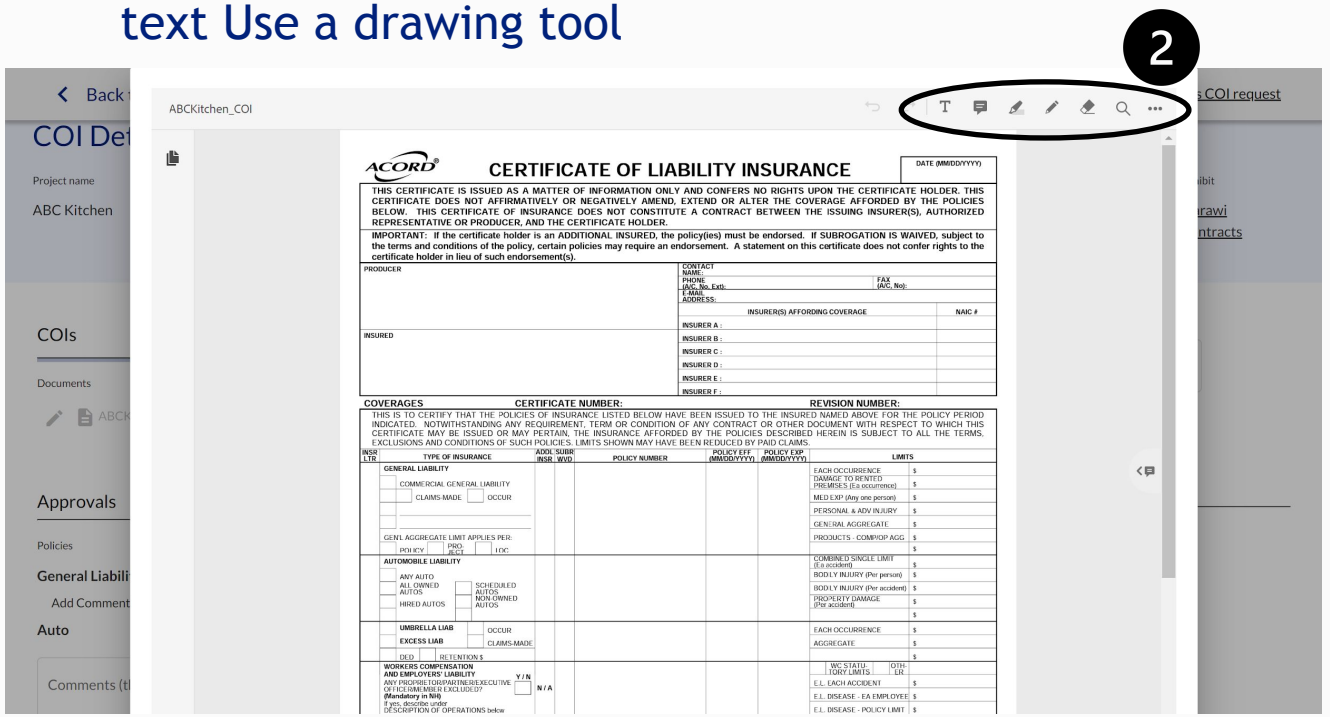
4. Certificates - Redline Submitted PDF (6 of 6)

In the COI Details page, you can directly edit submitted PDFs by subcontractors

1. Click on the “Pen” Icon (located to the left of the file) to open the PDF editor overlay



2. In the PDF editor overlay, add a comment/note, add a text field ,Highlight, Strikethrough or underline text Use a drawing tool

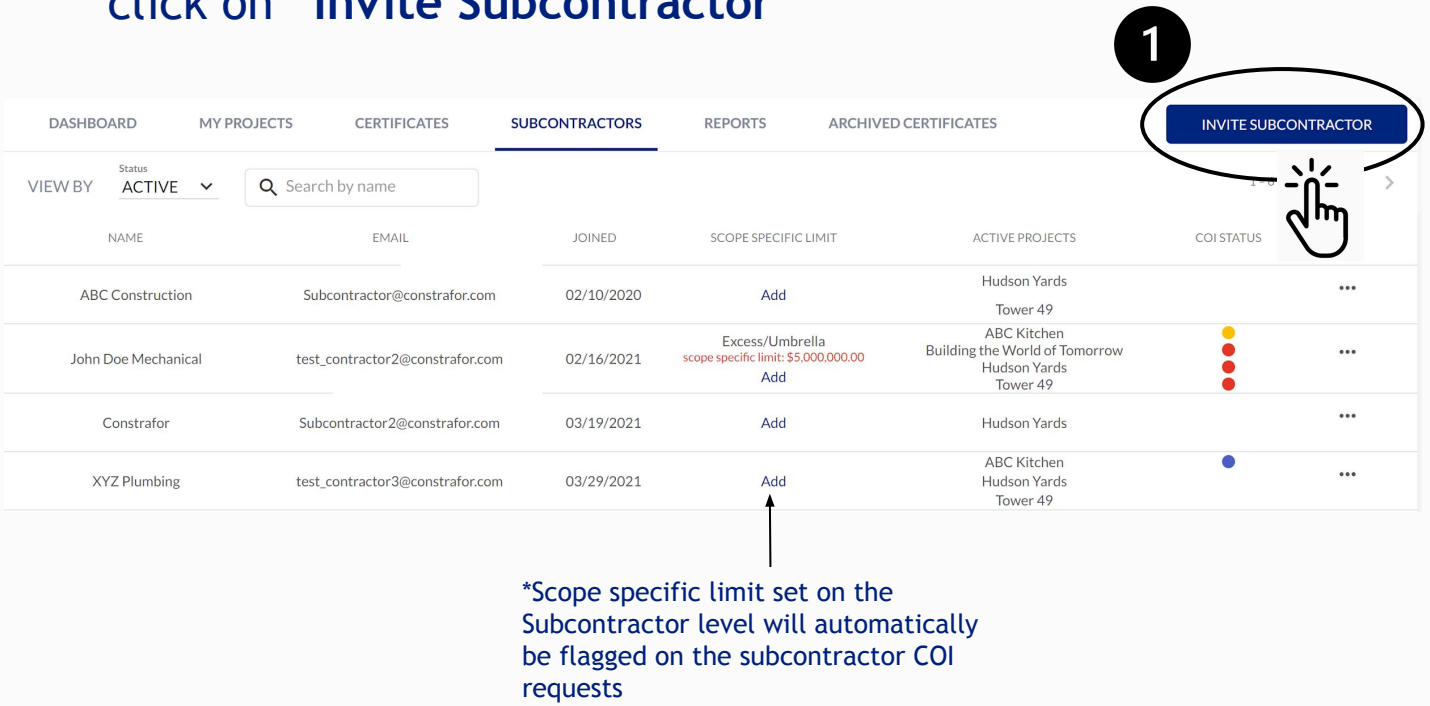


Please note that you can save your changes to the existing document uploaded by the subcontractor or “Save as” the edited document as a new file and edit the document name

5. Subcontractors Tab

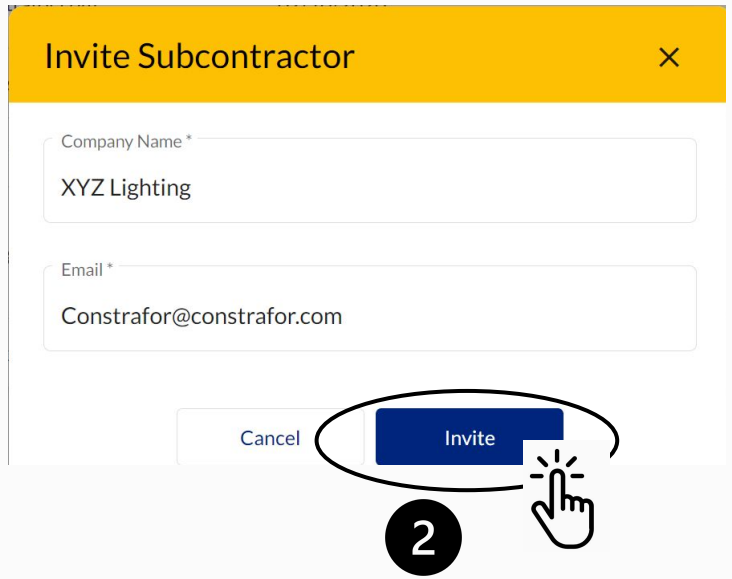
View subcontractor directory & invite news subcontractors to register to Constrafor

1. To invite a new subcontractor to join Constrafor, click on **“Invite Subcontractor”**



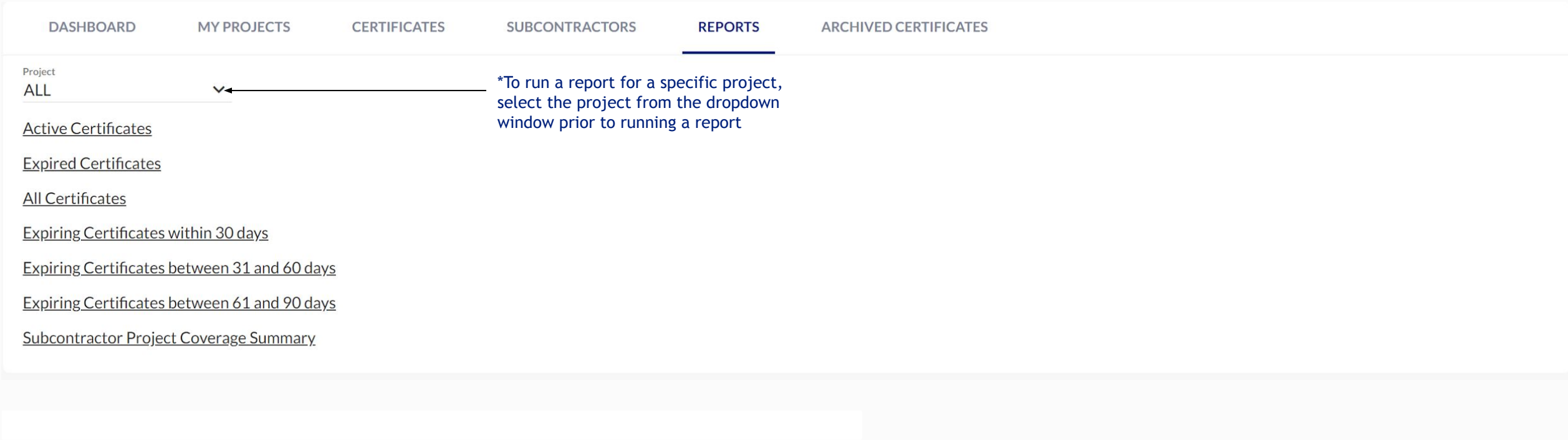
*Scope specific limit set on the Subcontractor level will automatically be flagged on the subcontractor COI requests

2. Enter the Subcontractor Company Name and email address. Then, click **“Invite”**



6. Reports Tab

Export COI Management Tool data into Excel across your portfolio, or for a specific project.



7. COI Request Lifecycle

General Contractor

Process Step	COI Status
1. COI Request sent to Subcontractor →	Required
2. Subcontractor/Agent submits documents to GC ←	Pending Approval
3.a. GC can approve, or 3.b. Reject →	Active Rejected
4.a. If approved, no action required 4.b. Subcontractor/Agent, resubmits documents (GC repeats step 3) ←	✓ Pending Approval
5. System notifies Subcontractor/Agent when a policy is expired (renewals can be submitted prior to expiration) →	Expired
6. Subcontractor/Agent submits renewal documents to GC (GC repeats step 3) ←	Pending Approval

Subcontractor

Insurance Broker

8. User Management

General Contractor

- Admin (full access)
- Risk (full access to COI Management Tool)
- Field Operations (Read Only, project-based permissions)
- Project Manager (full access to COI Management Tool, project-based permissions)
- Project Administrator(full access to COI Management Tool)

Subcontractor

Insurance Broker

- Admin (full access)
- Risk (full access to COI Management Tool)
- Field Operations (Read Only, project-based permissions)
- Project Manager (full access to COI Management Tool, project-based permissions)
- Project Administrator(full access to COI Management Tool)
- *Insurance brokers (full access to COI Management tool upon accepted invitations from subcontractors)*

Stay Connected

support@constrafor.com

Follow our Progress

www.constrafor.com