

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



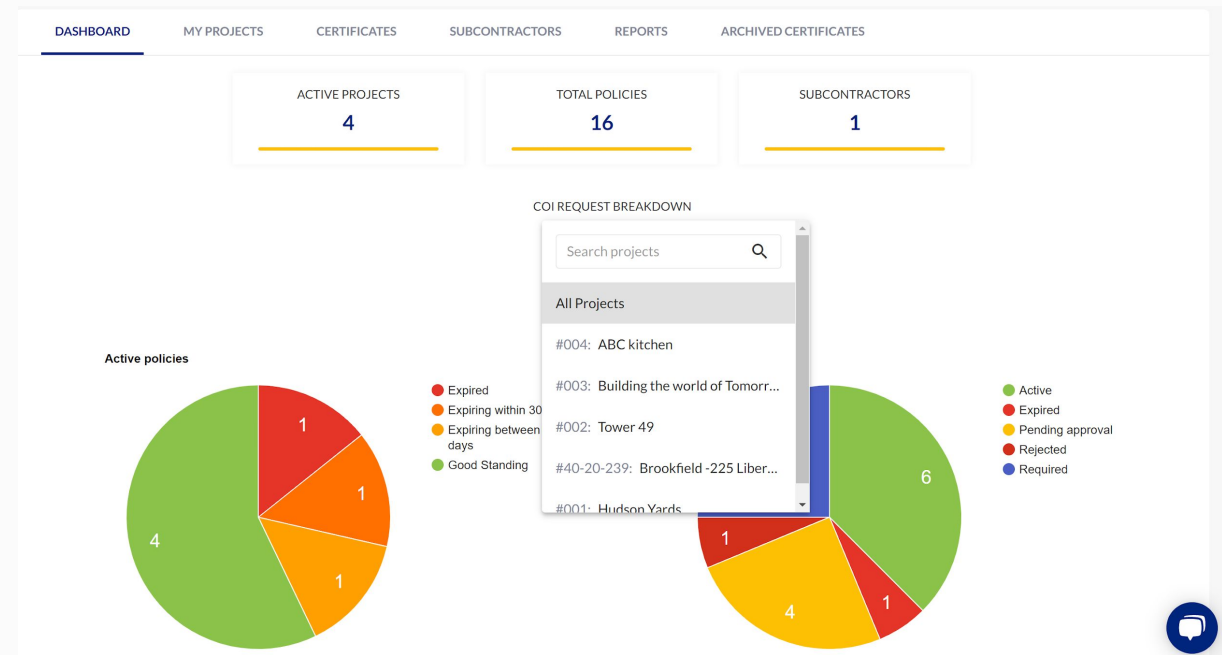
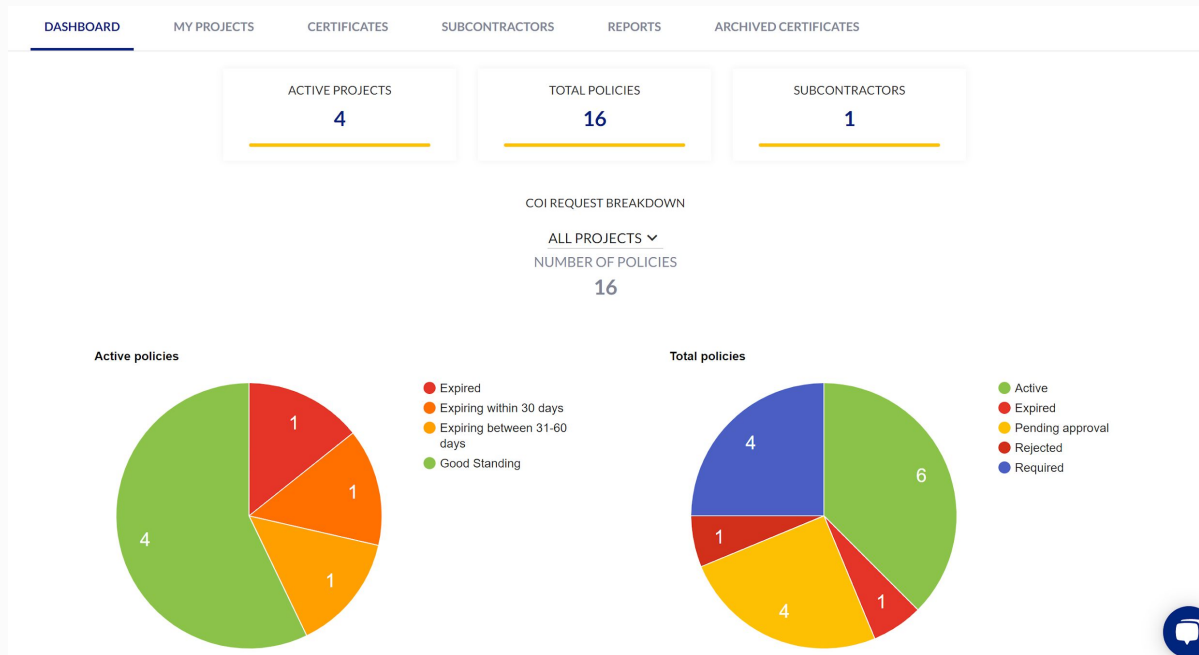
*Click on the Titles to navigate between the different tabs

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

Annotations:

- *Project name and project number search capabilities (points to search filters)
- *Snapshot count of COI status by project (points to the '...' menu icon in the table)

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

New Project [X]

Project Name: Reshaping the Construction Industry Number: 1234

Location: New York, NY, USA [X] Region: Office:

Type: Private Public

COI Requirements:

- General Liability
- Auto
- Excess/Umbrella
- Workers Comp
- Professional Liability
- Pollution Liability
- Inland Marine Insurance

Certificate Holders:

- General Contractor
- Client
- Building Owner
- Architect
- Other

Additional approvers:

- Building Owner

Insurance Requirements: Upload or drag files here

2 CREATE

*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”

PROJECT	NUMBER	LOCATION	CREATED	TYPE	SUBS	TOTAL COIs	PENDING APPROVAL	REJECTED/ EXPIRED	ACTIVE	REQUIRED	
ABC kitchen	004	New York, NY	08/16/2021	Private	0	0	0	0	0	0	...
Building the world of Tomorrow	003	New York, NY	08/16/2021	Private	0	0	0	0	0	0	...
Tower 49	002	New York, NY	02/02/2021	Private	5	8	0	2	6	0	...
Hudson Yards	001	New York, NY	03/17/2020	Private	3	13	7	1	1	4	...

Edit Project

Project Name: ABC kitchen Number: 004

Location: New York, NY, USA Region: Office: X

Type: Private Public

COI Requirements:

- General Liability
- Auto
- Excess/Umbrella
- Workers Comp
- Professional Liability
- Pollution Liability
- Inland Marine Insurance

Certificate Holders:

- General Contractor
- Client
- Building Owner
- Architect
- Other

Additional approvers:

- Building Owner

Insurance Requirements: Upload or drag files here

CANCEL **SAVE**

4. Certificates - Requesting COIs (2 of 6)

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

The screenshot displays the 'CERTIFICATES' section of a software interface. At the top, there is a navigation bar with tabs for DASHBOARD, MY PROJECTS, CERTIFICATES (which is underlined), SUBCONTRACTORS, REPORTS, and ARCHIVED CERTIFICATES. Below this is a 'VIEW BY' section with filters for Status (ALL), Expiration (ALL), Project name (ALL), and Subcontractor (ALL), along with a 'Range filter by expiration...' option. A table header is visible with columns: PROJECT, SUBCONTRACTOR, CONTRACTED BY, REQUEST DATE, LAST UPDATE, POLICIES, EXPIRATION, OWNER, and STATUS. A large blue button labeled 'Add certificate request' is centered below the table. On the right side, a dark blue button labeled 'REQUEST COIs' is circled in black, with a hand cursor icon pointing to it and a circled '1' below it, indicating the step to click this button.

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

Request COIs

Choose Project

Project
Building the world of Tomorrow

Policies		Certificate Holders	
<input checked="" type="checkbox"/> General Liability	<input type="checkbox"/> Professional Liability	<input checked="" type="checkbox"/> General Contractor	
<input checked="" type="checkbox"/> Auto	<input type="checkbox"/> Pollution Liability	<input type="checkbox"/> Client	
<input checked="" type="checkbox"/> Excess/Umbrella	<input type="checkbox"/> Inland Marine Insurance	<input type="checkbox"/> Building Owner	
<input checked="" type="checkbox"/> Workers Comp	<input type="checkbox"/> Builders Risk	<input type="checkbox"/> Architect	
		<input type="checkbox"/> Other	

Enter subcontractor name or email address

Start typing to see search results

XYZ Lighting Prime Contractor ABC Construction [edit](#)

Close Send Requests

*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.

DASHBOARD	MY PROJECTS	CERTIFICATES	SUBCONTRACTORS	REPORTS	ARCHIVED CERTIFICATES	REQUEST COIs		
VIEW BY	Status ALL	Expiration ALL	Project name ALL	Subcontractor ALL	Range filter by expiration...	1 - 4 of 4		
PROJECT	SUBCONTRACTOR	CONTRACTED BY	REQUEST DATE	LAST UPDATE ↑	POLICIES	EXPIRATION	OWNER	STATUS
ABC kitchen	ABC Concrete ✓	ABC Construction	08/17/2021	08/17/2021	General Liability	08/17/2022	Not Required	Pending approval
					Auto	08/17/2022	Not Required	Pending approval
					Excess/Umbrella	08/17/2022	Not Required	Pending approval
					Workers Compensation	08/17/2022	Not Required	Pending approval
Building the world of Tomorrow	ABC Concrete ✓	ABC Construction	08/17/2021	08/19/2021	General Liability	08/18/2021	Not Required	Expired
					Auto	09/18/2021	Not Required	Active
					Excess/Umbrella	08/18/2022	Not Required	Rejected
					Workers Compensation	10/18/2021	Not Required	Active
Hudson Yards	ABC Concrete ✓	ABC Construction	08/19/2021	08/19/2021	General Liability	-	Not Required	Required
					Auto	-	Not Required	Required
					Excess/Umbrella	-	Not Required	Required
					Workers Compensation	-	Not Required	Required

*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

DASHBOARD						MY PROJECTS		CERTIFICATES		SUBCONTRACTORS		REPORTS		ARCHIVED CERTIFICATES		REQUEST COIs	
VIEW BY	Status	Expiration	Project name	Subcontractor	Range filter by expiration...					1 - 3 of 3							
PROJECT	SUBCONTRACTOR	CONTRACTED BY	REQUEST DATE	LAST UPDATE ↑	POLICIES	EXPIRATION	OWNER	STATUS									
ABC kitchen	ABC Concrete ✓	ABC Construction	08/17/2021	08/17/2021	General Liability	08/17/2022	Not Required	Pending approval									
					Auto	08/17/2022	Not Required	Pending approval									
					Excess/Umbrella	08/17/2022	Not Required	Pending approval									
					Workers Compensation	08/17/2022	Not Required	Pending approval									
Building the world of Tomorrow	ABC Concrete ✓	ABC Construction	08/17/2021	08/17/2021	General Liability	08/18/2021	Not Required	Active									
					Auto	08/18/2022	Not Required	Active									
					Excess/Umbrella	08/18/2022	Not Required	Rejected									
					Workers Compensation	08/18/2022	Not Required	Pending approval									
Tower 49	ABC Concrete ✓	ABC Construction	08/17/2021	08/17/2021	General Liability	-	Not Required	Required									
					Auto	-	Not Required	Required									
					Excess/Umbrella	-	Not Required	Required									
					Workers Compensation	-	Not Required	Required									

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. **1** Once complete, click “Save”. **2** **3**

COI Details

Project name: ABC Kitchen, Project number: 004, Subcontractor: ABC Steel, Certificate Holders: General Contractor, Region: -, Office: -, Insurance Requirements: ABCKitchen_InsuranceRequirements.pdf

COIs

Documents

Documents	Submitted	Updated
ABCKitchen_COI.pdf	ralph.maarawi@constrafor.com 11/01/2021 18:30	

Approvals

Policies	Submitted	Expires	Status	Approval	Last Reviewed By
General Liability	11/01/2021	11/08/2021	Pending approval	<input type="checkbox"/> Approve <input type="checkbox"/> Reject	None
Auto	11/01/2021	02/02/2024	Pending approval	<input type="checkbox"/> Approve <input checked="" type="checkbox"/> Reject	None
Excess/Umbrella	11/01/2021	02/02/2024	Pending approval	<input type="checkbox"/> Approve <input type="checkbox"/> Reject	None
Workers Compensation	11/01/2021	02/02/2024	Pending approval	<input type="checkbox"/> Approve <input type="checkbox"/> Reject	None

Internal Notes

You have no internal notes

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.

3

*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

COI Details

Project name: ABC Kitchen, Project number: 004, Subcontractor: ABC Steel, Certificate Holders: General Contractor, Region: -, Office: -, Insurance Requirements: ABCKitchen_InsuranceRequirements.pdf, Insurance Exhibit: Ralph Maarawi (Test for contracts)

COIs

Documents	Submitted	Updated			
ABCKitchen_COI.pdf	ralph.maarawi@constrafor.com 11/01/2021 18:30				

Internal Notes

You have no internal notes

Policies	Submitted	Expires	Status	Approval	Last Reviewed By
General Liability	11/01/2021	11/08/2021	Pending approval	Approve Reject	None
Auto	11/01/2021	02/02/2024	Pending approval	Approve Reject	None
Excess/Umbrella	11/01/2021	02/02/2024	Pending approval	Approve Reject	None
Workers Compensation	11/01/2021	02/02/2024	Pending approval	Approve Reject	None

ABCKitchen_COI

CERTIFICATE OF LIABILITY INSURANCE

ACORD

INSURER A, INSURER B, INSURER C, INSURER D, INSURER E, INSURER F

COVERAGES

INSUR	TYPE OF INSURANCE	ADDL SUBR	POLICY NUMBER	POLICY EFF	POLICY EXP	LIMITS
GENERAL LIABILITY	COMMERCIAL GENERAL LIABILITY					EACH OCCURRENCE \$
	CLAIMS MADE					DAMAGE TO RENTED PREMISES (Ea occurrence) \$
						MED EXP (per one person) \$
						PERSONAL & ADJ INJURY \$
						GENERAL AGGREGATE \$
						PRODUCTS - COMP/OP AGG \$
						AGGREGATE \$
AUTOMOBILE LIABILITY	ANY AUTO					COMBLED SINGLE LIMIT (Ea occurrence) \$
	ALL OWNED AUTOS					BODILY INJURY (Per person) \$
	SCHEDULED AUTOS					BODILY INJURY (Per accident) \$
	HIRD AUTOS					TROUBLETY DAMAGE (Per accident) \$
						\$
UMBRELLA LIAB						EACH OCCURRENCE \$
EXCESS LIAB						AGGREGATE \$
						\$
WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						MT, STATE, LTD \$
						OTH- LTD \$
						E.L. EACH ACCIDENT \$
						E.L. DISEASE - EA EMPLOYEE \$
						E.L. DISEASE - POLICY LIMIT \$

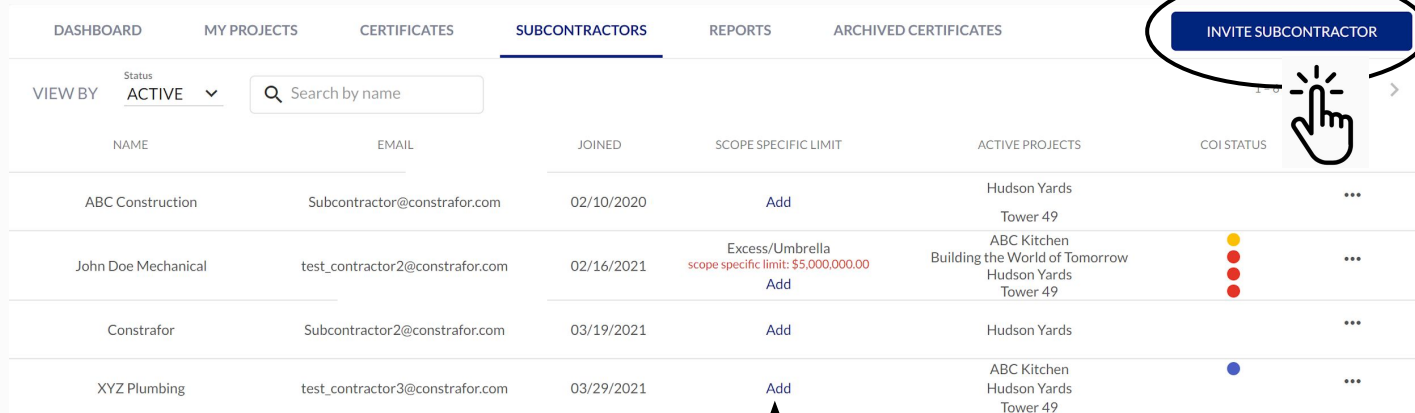
! Please note that you can save your changes to the existing document uploaded by the subcontractor or “Save as” the edited document as a new file and edit the document name

5. Subcontractors Tab

View subcontractor directory & invite new subcontractors to register to Constrafor

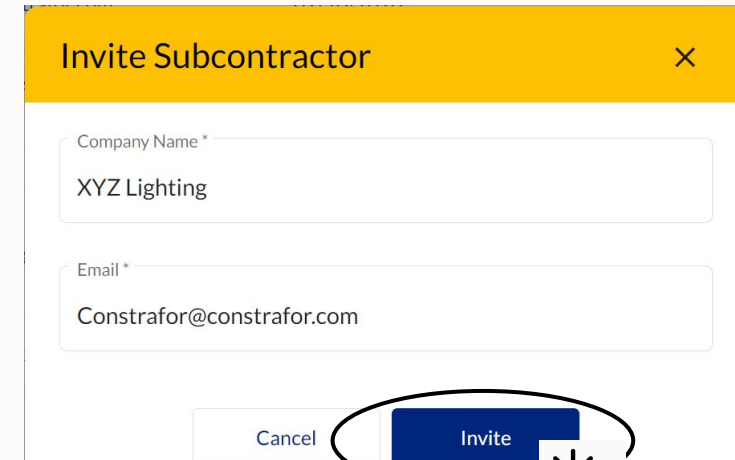
1 To invite a new subcontractor to join Constrafor, click on “Invite Subcontractor”

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



NAME	EMAIL	JOINED	SCOPE SPECIFIC LIMIT	ACTIVE PROJECTS	COI STATUS
ABC Construction	Subcontractor@constrafor.com	02/10/2020	Add	Hudson Yards Tower 49	...
John Doe Mechanical	test_contractor2@constrafor.com	02/16/2021	Excess/Umbrella scope specific limit: \$5,000,000.00 Add	Building the World of Tomorrow Hudson Yards Tower 49	...
Constrafor	Subcontractor2@constrafor.com	03/19/2021	Add	Hudson Yards	...
XYZ Plumbing	test_contractor3@constrafor.com	03/29/2021	Add	ABC Kitchen Hudson Yards Tower 49	...

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



Invite Subcontractor

Company Name *
XYZ Lighting

Email *
Constrafor@constrafor.com

Cancel Invite

6. Reports Tab

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

DASHBOARD MY PROJECTS CERTIFICATES SUBCONTRACTORS **REPORTS** ARCHIVED CERTIFICATES

Project
ALL

Active Certificates

Expired Certificates

All Certificates

Expiring Certificates within 30 days

Expiring Certificates between 31 and 60 days

Expiring Certificates between 61 and 90 days

Subcontractor Project Coverage Summary

*To run a report for a specific project, select the project from the dropdown window prior to running a report

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)

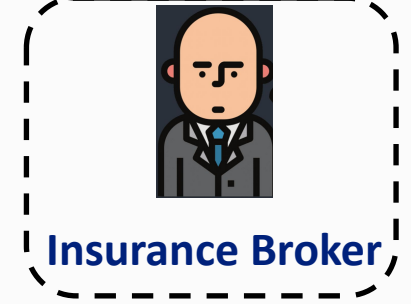
Expired

6. Subcontractor/Agent submits renewal documents to GC (GC repeats step 3)

Pending Approval



Subcontractor

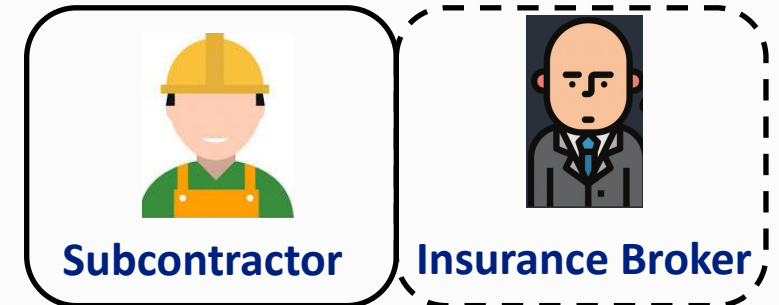


Insurance Broker

8. User Management



- 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)



- 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)*

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