CertFocus Product Features

Take Control With Ease

The burden of staying on top of every certificate, form and document you need to monitor for insurance purposes is transformed with **CertFocus**. Log into the system, and you'll activate the powerful, individualized Dashboard that lets you review, control, search, report, and inspect the latest activity of every COI and related document you need with ease, speed and accuracy. Control users and levels of access. Monitor AM Best ratings. And know this completely secure web-based tool and resource is at your fingertips 24 hours a day, 7 days a week.

CertFocus features that simplify COI and document management include:

FEATURES	DESCRIPTION
Dashboard	Log into the system to display the Dashboard, the initial view into the user's account. From the Dashboard, you can review any and all activity's.
Administrator Access	Create/remove users, accept and reject certificates of insurance as well as related documents. A hierarchy setup enables a user to drill down into multiple documents either by location and or divisions or project.
Image Vault	All COIs , contracts and any other document images scanned into the system are stored. All images are retrievable, viewable and printable.
Alerts & Notifications	Email alerts are automatically sent out to the insured's: • when a certificate is received, • when it has been accepted or rejected, and • with the reason for rejection (where applicable).
Search Engine	A dynamic search engine allows for the retrieval certificates of insurance and other document images stored in the system. User may extract the image using a variety of criteria.
Reporting	Users may generate reports in PDF format. All reports are exportable to Excel CSV. Multiple pre-defined reports are built into the system. Reports are easily customized based on customer requirements.
Viewing Functionality	View and download a certificate of insurance and related documents as an image or PDF file after data entry has taken place. Unlike reporting where you see only a summary of the information, with Viewing Functionality you see the physical document along with all the selected criteria.
AM Best	The Dashboard provides AM Best data feeds, showing the ratings of all insurance carriers on your insured's certificates. This allows the enforcement of compliance based on minimum ratings required by the customer. Should a carrier's rating drop, a new certificate of insurance for one or many of the insured's whose certificate has been effected can be requested.
Collaboration	Messages relating to pending certificates that need review and messages sent from inside the CertFocus system are viewable to all users (depending upon level of user rights). The Collaboration feature allows for updates, comments, notes and messages to be added and shared within the system.
Store Insurance Requirements	System can store an unlimited number of insurance sets, used to request certificates and applicable documents from insured's. System also allows customization to individually name each insurance set.
Cross Reference Engine	System checks all certificates of insurance against the original certificate of insurance requirements as sent out in the request to an insured. Any items not matching the original requirements are highlighted for further review.
Receipt Confirmations	Confirmations that a certificate of insurance has been received are sent out from the system to the users, along with a confirmation back to the insured who sent in the certificate of insurance. This notification is also available on the Dashboard.