

Axis Portal™

COI Management
User Manual



AXIS Portal Client Support

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About Tenant and Vendor COI

The COI Management tool helps you maintain current Certificate of Insurance records for the various Tenants and Vendors who perform work for your company. Maintaining COI information using Axis Portal means that all of the COI records for your company are kept securely, online and in one location.

The main benefit of the COI Management tool is the COI Expiry Notification. When COIs are about to expire, Axis Portal automatically sends an email to selected Tenant Contacts or Vendors to let them know that the COI needs to be renewed. To expedite the renewal process, this notification includes all of the information that the Tenant or Vendor needs for the COI including Additional Named Insured, Policy Requirements and Contact information.

Another benefit is that COI information is available to help when assigning work orders. Vendors with COIs that have expired or are about to expire are visually indicated on the Assign To drop down list allowing you to make a more informed decision when assigning work orders to vendors.

Note:

- Tenant COI and Vendor COI are separate optional features. If your company is interested in the COI Management Tool, please contact your Axis Portal™ Account Executive or Axis Portal Support.

Tenant COI

[Control Panel](#) > [Building Services](#) > [COI](#) > [Tenants](#)

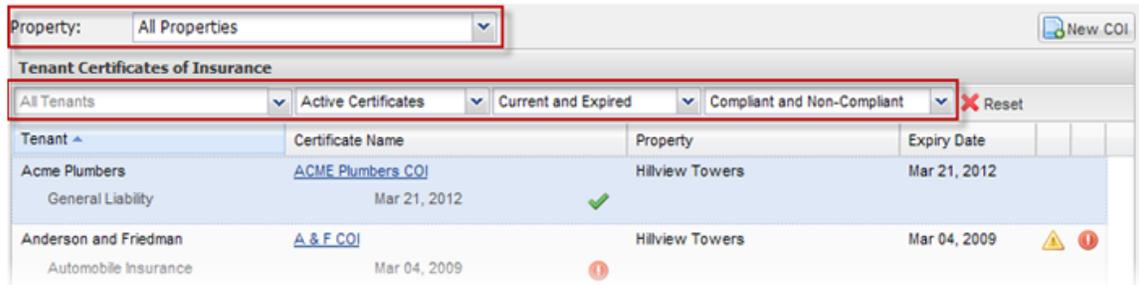
Tenant COI provides an intuitive interface for managing tenants' Certificates of Insurance with policy, expiry and compliance information at your fingertips. Using Tenant COIs allows policies to be accessible by all properties and can be overridden should the property or tenant introduce special circumstances.



Tenant	Certificate Name	Property	Expiry Date
Acme Plumbers General Liability	ACME Plumbers COI Mar 21, 2012	Hillview Towers	Mar 21, 2012
Anderson and Friedman Automobile Insurance	A & F COI Mar 04, 2009	Hillview Towers	Mar 04, 2009

The Tenant Certificates of Insurance list can be searched by entering a tenant's name in the Tenant box (enter at least 3 characters to search for possible matches), or filtered by:

- Active/Inactive
- Current and/or Expired
- Compliance



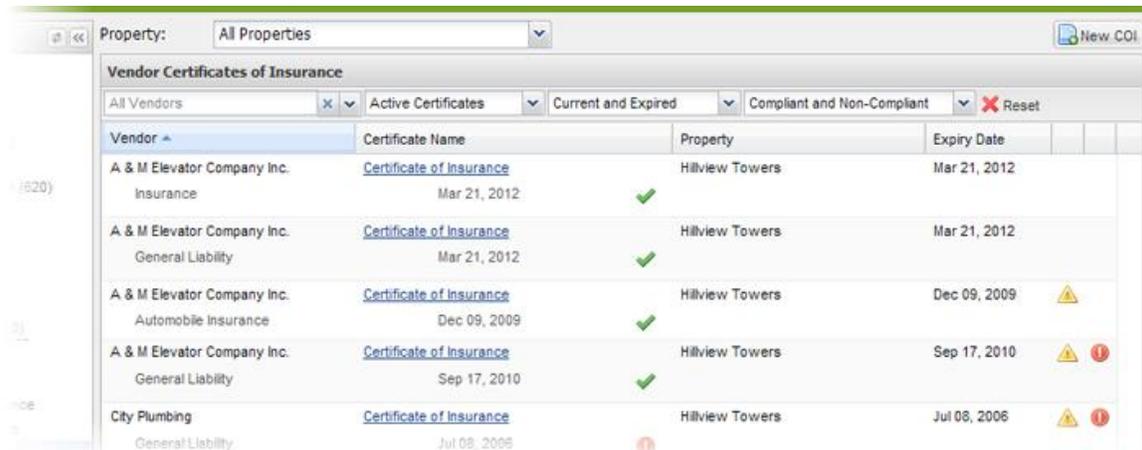
Tenant	Certificate Name	Property	Expiry Date
Acme Plumbers General Liability	ACME Plumbers COI Mar 21, 2012	Hillview Towers	Mar 21, 2012
Anderson and Friedman Automobile Insurance	A & F COI Mar 04, 2009	Hillview Towers	Mar 04, 2009

See [Adding a COI](#) for more information on entering COIs into Axis Portal™.

Vendor COI

[Control Panel](#) > [Building Services](#) > [COI](#) > [Vendors](#)

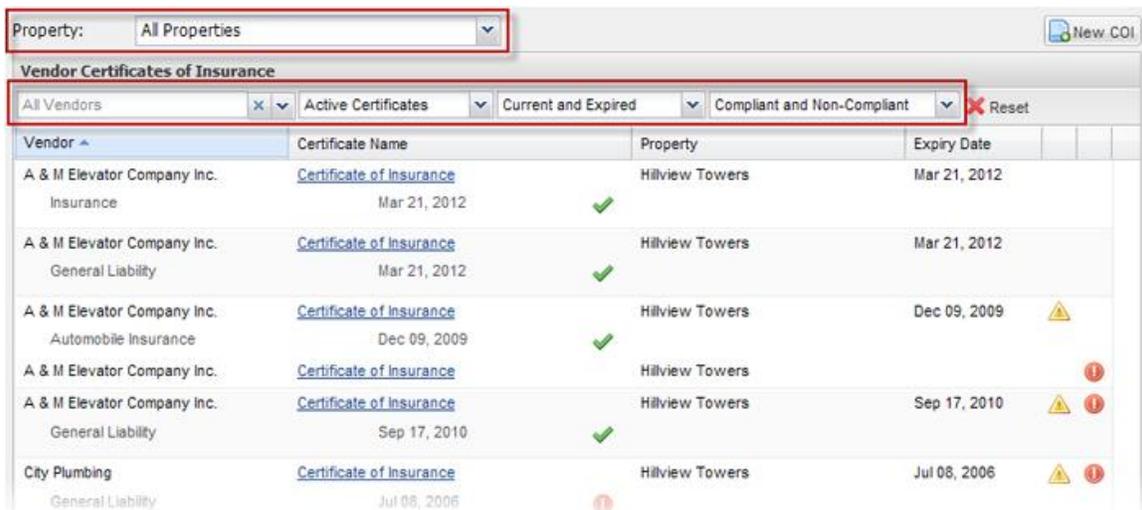
Vendor COI provides an intuitive interface for managing vendor Certificates of Insurance with policy, expiry and compliance information at your fingertips. Using Vendor COIs allows policies to be accessible by all properties and can be overridden should the property or vendor introduce special circumstances.



Vendor	Certificate Name	Property	Expiry Date		
A & M Elevator Company Inc. Insurance	Certificate of Insurance Mar 21, 2012	Hillview Towers	Mar 21, 2012	✓	
A & M Elevator Company Inc. General Liability	Certificate of Insurance Mar 21, 2012	Hillview Towers	Mar 21, 2012	✓	
A & M Elevator Company Inc. Automobile Insurance	Certificate of Insurance Dec 09, 2009	Hillview Towers	Dec 09, 2009	✓	⚠
A & M Elevator Company Inc. General Liability	Certificate of Insurance Sep 17, 2010	Hillview Towers	Sep 17, 2010	✓	⚠ ⓘ
City Plumbing General Liability	Certificate of Insurance Jul 08, 2006	Hillview Towers	Jul 08, 2006	ⓘ	⚠ ⓘ

The Vendor Certificates of Insurance list can be searched by entering a vendor's name in the **Vendor** box (enter at least 3 characters to search for possible matches), or filtered by:

- Active/ Inactive
- Current and/ or Expired
- Compliance



Vendor	Certificate Name	Property	Expiry Date		
A & M Elevator Company Inc. Insurance	Certificate of Insurance Mar 21, 2012	Hillview Towers	Mar 21, 2012	✓	
A & M Elevator Company Inc. General Liability	Certificate of Insurance Mar 21, 2012	Hillview Towers	Mar 21, 2012	✓	
A & M Elevator Company Inc. Automobile Insurance	Certificate of Insurance Dec 09, 2009	Hillview Towers	Dec 09, 2009	✓	⚠
A & M Elevator Company Inc. General Liability	Certificate of Insurance Sep 17, 2010	Hillview Towers	Sep 17, 2010	✓	⚠ ⓘ
City Plumbing General Liability	Certificate of Insurance Jul 08, 2006	Hillview Towers	Jul 08, 2006	ⓘ	⚠ ⓘ

Setting up COI Management

Vendor Types

Policy requirements differ depending on the type of vendor. In order to add policy requirements to each vendor type, a Vendor Type list needs to be created.

To Add Vendor Types to the Vendor Type List:

Contact your Axis Portal support team to have Vendors added to your COI list.

Policy Requirements

[Control Panel](#) > [Building Services](#) > [COI](#) > [Policy Requirements](#)

About:

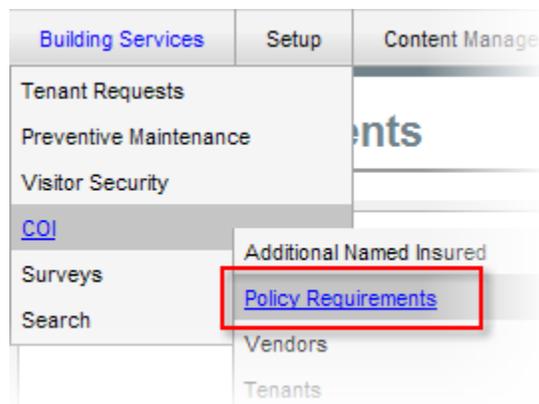
If a property has its own insurance policy requirements, a document can be attached to the vendor type. When a COI Expiry Notification is sent to a vendor, the Policy Requirements Document for that vendor type will be automatically attached to the message.

Note:

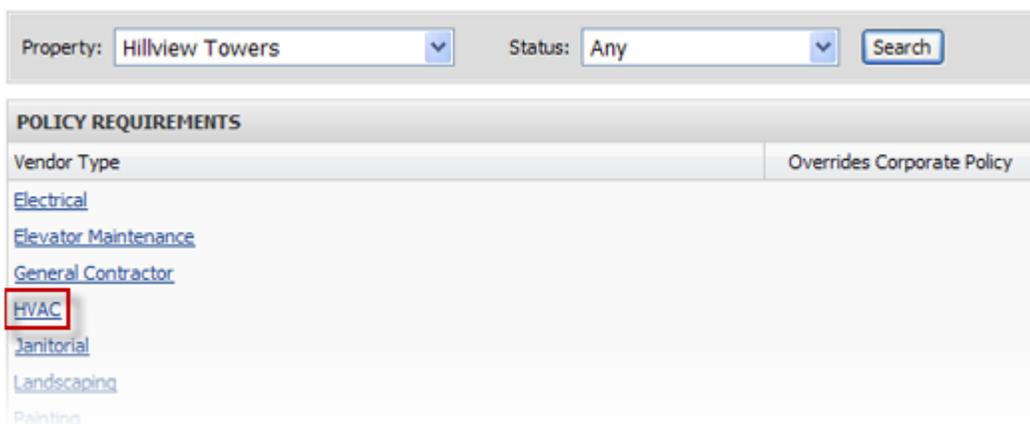
- If a Vendor COI spans multiple properties, the Corporate Policy Requirements document will be sent.

Adding Policy Requirements

1. Click [Control Panel](#) > [Building Services](#) > [COI](#) > [Policy Requirements](#).



2. Click the desired **Vendor Type**.



3. The Policy Requirements page is displayed.
4. Select the **Property Level** Policy Requirements option.

Note:

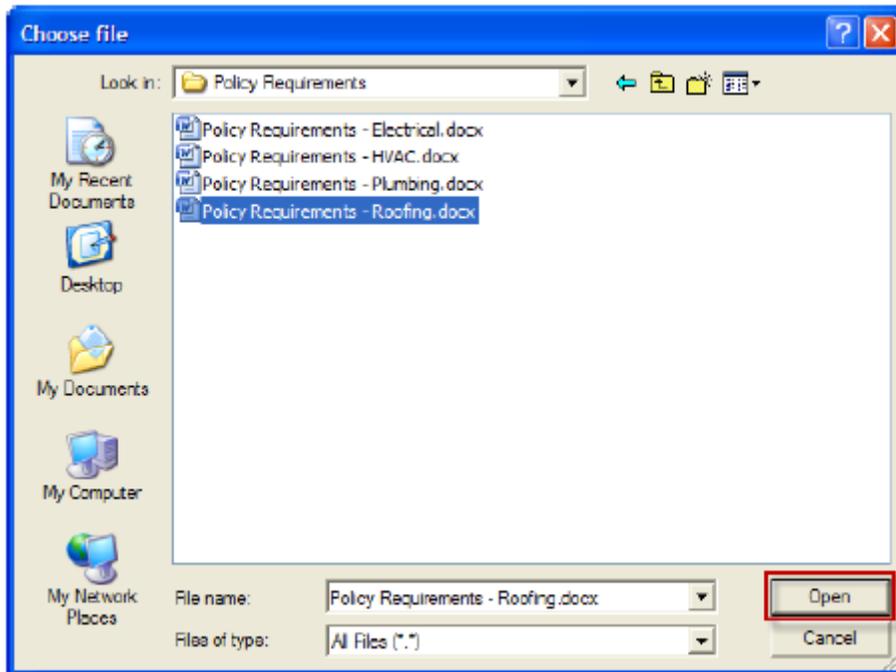
- Always select Property Level Policy Requirement for the Corporate Level is reserved for special circumstances, and you will be notified by the Axis Portal support team if it is applicable to your property conditions.
5. Click **Browse** and select the document to attach.

POLICY REQUIREMENTS

Please use this screen to either adopt the Corporate Policy Requirements for **Roof** vendors in **One Corporate Tower** or to upload an alternate document for **One Corporate Tower** that overrides the corporate policy.

Corporate Level Certificate of Insurance Requirements.pdf

Property Level Upload New: **Browse...**



6. Click **Save Requirements**. The document is attached to the vendor type.

Additional Insured

[Control Panel > Building Services > COI > Additional Named Insured](#)

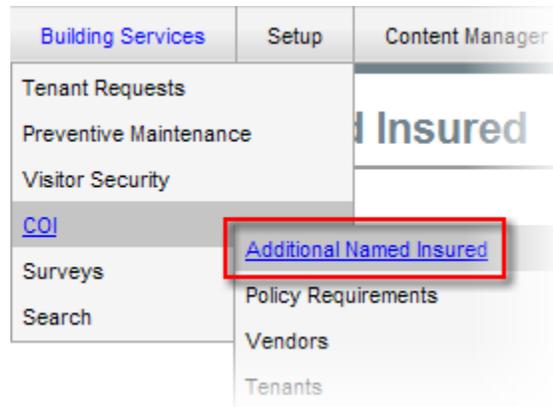
One requirement of a COI is a list of Owner Entities, also known as the Additional Insured (AI). This is the list of parties or individuals who are covered by the COI.

The Additional Insured page allows you to enter all of the Additional Insured for each property so that the appropriate list can be embedded in the policy requirements and COI Expiry notifications sent to each vendor.

For COIs that span multiple properties, Axis Portal will automatically remove any duplicate Additional Insured entries from the COI Expiry Notification list.

Adding an Additional Insured List to a Property

1. Click [Control Panel > Building Services > COI > Additional Named Insured](#)



2. Click **Edit** beside the desired property.
3. Enter the name of the Additional Insured in the space provided. Ensure that each name is on a new line.



4. Click **Update**. The Additional Insured entries are saved.

COIs Spanning Multiple Properties

There are some cases where a COI needs to cover multiple properties. For example, a regional or national vendor contract that covers more than one property within the company. Rather than enter a COI for every single property, the additional properties can be included on the COI by adding them to the Additional Insured. By having only one COI record, the vendor receives only one COI Expiry Notification.

Another example is a multi-building property that was setup in Axis Portal™ as three distinct properties and thus requires a single COI to be set up to span all three properties. In this case, you can also use the Additional Insured list to include all of the buildings that require the COI.

In addition, if there are any duplicate Additional Insured entries among the properties covered by the COI, your Axis Portal will automatically remove them.

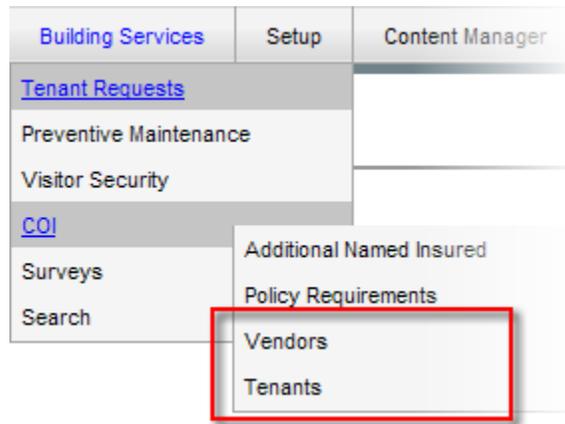
Note:

- See *Document Option on COI Expiry Notification* in the topic [COI Expiry Notifications](#) for more information.

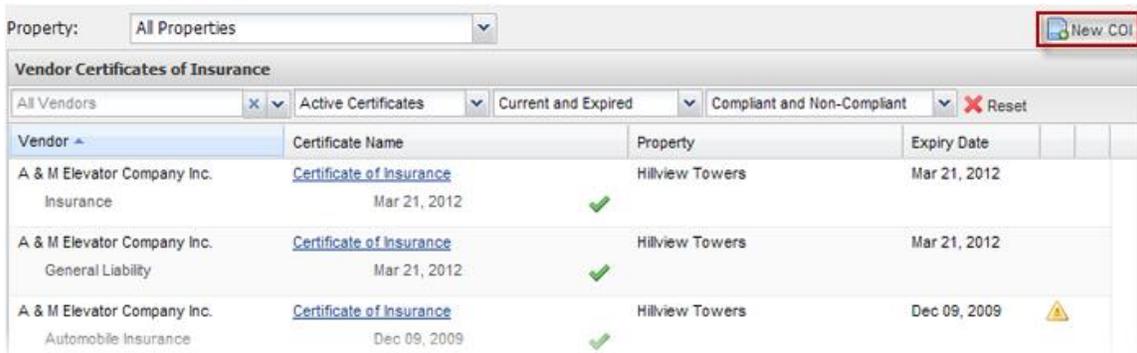
Using COI Management

Adding a Vendor COI

1. Click *Control Panel > Building Services > COI > Vendors*



2. The Certificates of Insurance page is displayed. Click **New COI**.



3. The new Vendor COI page is displayed.
4. Enter a **Vendor Name**. Enter at least three characters in the vendor's name in order to see a list of possible matches.
5. Enter a **COI Title**.
6. Add a **COI Document** to upload by clicking the browse button () and selecting the file on your computer in the browse interface.
7. If you do not want this document to be attached to expiry notifications, remove the checkmark beside **Attach Document to COI Expiry Notifications**.

8. Select which properties this new COI will apply to. You can either drag and drop properties from the **Available** list to the **Assigned** list, or select properties by clicking on them and using the arrow buttons located between these lists.

 **New Vendor COI**

General Information

Vendor: x v
Enter at least three characters

COI Title:

Documentation

COI Document: 

Attach Document to COI Expiry Notifications

Properties

Available

Pine Valley Terrace

Assigned

Hillview Towers

>

>>

<

<<

Expiry Notifications

Inform Employees and days before expiry until 

9. In the Expiry Notifications section, place or remove checkmarks beside **Inform Employees** and **Inform Vendor** as applicable.
 - For each of the above options, you can select two dates prior to expiry to send notifications; the default settings a 30 and 15 days. If you do not want a second set of expiry notifications to be send, leave the second box empty.
 - In the **...days before expiry until** section, click the calendar icon () and use the menu provided to enter a hard date after which expiry notifications will no longer be sent; you can leave this section empty if you do not want to stop sending automatic notifications.
10. If you do not want to include the Policy Requirements Document with these notifications, remove the checkmark beside **Include Policy Requirements Document**.

11. Select either **Notify Primary Vendor Contact** or **Notify Alternate Vendor Contact**. If you select the second option, you must specify a contact name, email and phone number.
12. If you would like to add a custom signature, you can enter one in the **Customer Signature** text box provided.
13. Click **Create COI** to create the COI.

Expiry Notifications

Inform Employees and days before expiry until

Inform Vendor and days before expiry until

Include Policy Requirements Document

Notify Primary Vendor Contact (David Gluth)

Notify Alternate Vendor Contact

Contact Name:

Contact Email:

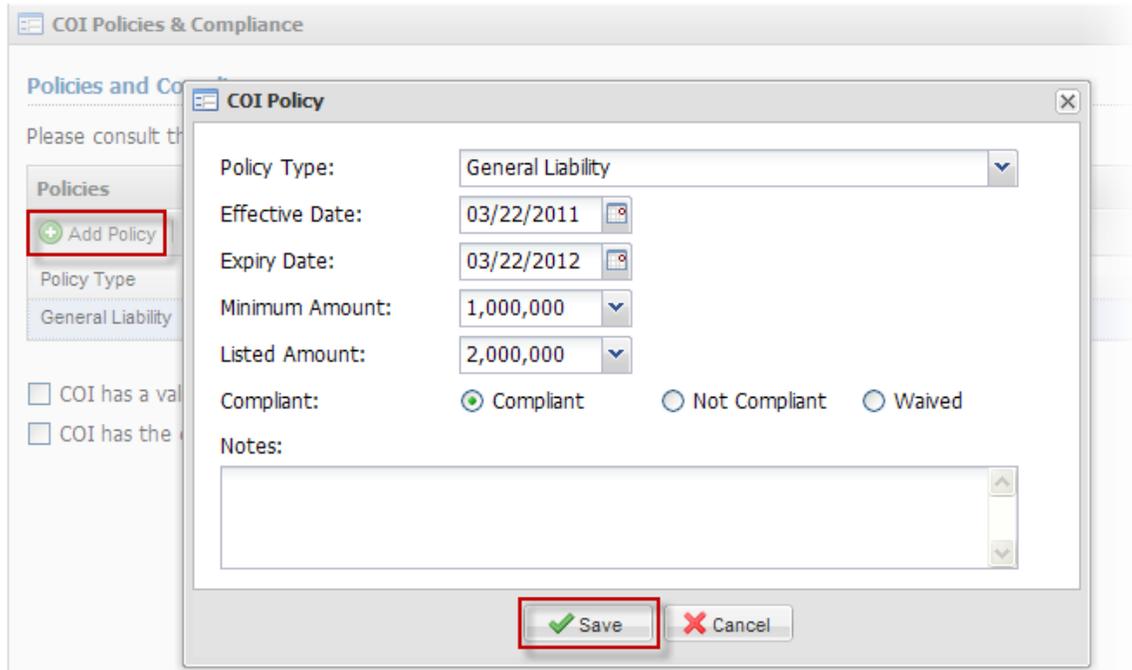
Contact Phone:

Custom Signature:

14. The **COI Policies & Compliance** section is displayed.
15. To add a policy, click **Add Policy** and fill in the following information:
 - **Policy Type**
 - **Effective Date**
 - **Expiry Date** (default is 1 year after Effective date, this can be overridden)
 - **Minimum Amount** (the minimum amount required for the policy to be compliant. You can select an amount from the dropdown or type in a specific amount.)
 - **Listed Amount** (the actual amount provided by the policy. You can select an amount from the dropdown or type in a specific amount.)
 - Select one of the following compliancy options:
 - **Compliant**

- **Not Compliant**
- **Waived** (use this option to manually override non-compliance. This should only be used in special circumstances where compliancy has been intentionally exempted by your company.)
- Notes

16. Click **Save** when you are finished.



17. You can continue adding policies as described above; you can also edit or delete policies you have added by selecting the Policy and clicking **Edit** or **Delete**, as applicable.

18. Place a checkmark beside **COI has a valid signature** to indicate if the signature is valid.

19. Place a checkmark beside **COI has the correct Additional Insured** if this is correct. You can click on the underlined **Additional Insured** text to see if this is true.

Policies and Compliance

Please consult the [Official Policy Requirements](#) for guidance on marking the policies as compliant or non-compliant.

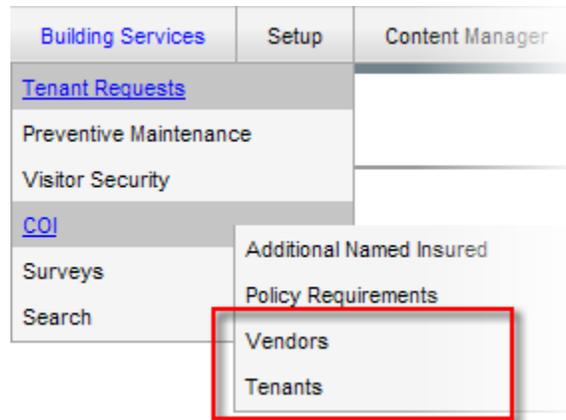
Policies						
 Add Policy	 Edit	 Delete				
Policy Type	Effective Date	Expiry Date	Minimum	Listed		
General Liability	Mar 22, 2011	Mar 22, 2012	1,000,000	2,000,000		

- COI has a valid signature
- COI has the correct [Additional Insured](#)

20. When you are done click **Finish**, located at the bottom of the page. You will be taken to the COI Details page. For more information, see Editing Information.

Adding a Tenant COI

1. Click *Control Panel > Building Services > COI > Tenants*



2. The Certificates of Insurance page is displayed. Click **New COI**.



3. The new Tenant COI page is displayed.
4. Select a Tenant. You can search for the tenant by entering at least three characters of the Tenant's name and selecting from a list of possible matches provided.
5. Choose the applicable lease from the drop-down list.
6. Enter a COI title.
7. Add a COI document to upload by clicking the browse button () and selecting the file on your computer in the browse interface.
8. If you do not want this document to be attached to expiry notifications, remove the checkmark beside Attach **Document to COI Expiry Notification**.
9. In the Expiry Notifications section, place or remove checkmarks beside **Inform Employees** and **Inform Tenant** as applicable.

- For each of the above options, you can select two dates prior to expiry to send notifications; the default settings a 30 and 15 days. If you do not want a second set of expiry notifications to be sent, leave the second box empty.
 - In the **...days before expiry until** section, click the calendar icon (📅) and use the menu provided to enter a hard date after which expiry notifications will no longer be sent; you can leave this section empty if you do not want to stop sending automatic notifications.
10. If you would like to add a custom signature, you can enter one in the **Customer Signature** text box provided.
 11. Click **Create COI** to create the COI.

New Tenant COI

General Information

Tenant:
Enter at least three characters

Lease:

COI Title:

Documentation

COI Document:

Attach Document to COI Expiry Notification

Expiry Notifications

Inform Employees and days before expiry until

Inform Tenant and days before expiry until

Custom Signature:

12. The **COI Policies & Compliance** section is displayed.
13. To add a policy, click **Add Policy** and fill in the following information:
 - **Policy Type**
 - **Effective Date**
 - **Expiry Date** (default is 1 year after Effective date, this can be overridden)

- **Minimum Amount** (the minimum amount required for the policy to be compliant. You can select an amount from the dropdown or type in a specific amount.)
- **Listed Amount** (the actual amount provided by the policy. You can select an amount from the dropdown or type in a specific amount.)
- Select one of the following compliancy options:
 - **Compliant**
 - **Not Compliant**
 - **Waived** (use this option to manually override non-compliance. This should only be used in special circumstances where compliance has been intentionally exempted by your company.)
- Notes

14. Click **Save** when you are finished.

The screenshot shows a 'COI Policy' dialog box with the following fields and options:

- Policy Type:** General Liability
- Effective Date:** 03/22/2011
- Expiry Date:** 03/22/2012
- Minimum Amount:** 1,000,000
- Listed Amount:** 2,000,000
- Compliant:** Compliant, Not Compliant, Waived
- Notes:** (Empty text area)
- Buttons:** Save (highlighted with a red box), Cancel

15. You can continue adding policies as described above; you can also edit or delete policies you have added by selecting the Policy and clicking **Edit** or **Delete**, as applicable.
16. Place a checkmark beside **COI has a valid signature** to indicate the signature is valid.
17. Place a checkmark beside **COI has the correct Additional Insured** if this is correct. You can click on the underlined **Additional Insured** text to see if this is true.

Policies and Compliance

Please consult the [Official Policy Requirements](#) for guidance on marking the policies as compliant or non-compliant.

Policies					
 Add Policy	 Edit	 Delete			
Policy Type	Effective Date	Expiry Date	Minimum	Listed	
General Liability	Mar 22, 2011	Mar 22, 2012	1,000,000	2,000,000	

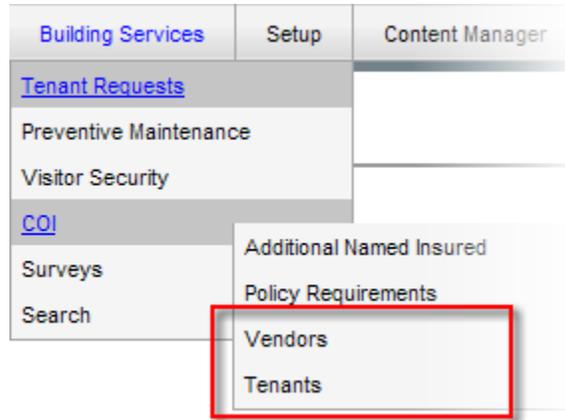
- COI has a valid signature
- COI has the correct [Additional Insured](#)

18. When you are done click **Finish**, located at the bottom of the page. You will be taken to the COI Details page. For more information see [Editing COI Information](#).

COI Details

The COI details screen allows you to view and edit information related to tenant and vendor COIs. It also provides a means of sending and receiving messages with the tenant/vendor, and viewing the COI's event history.

1. To view or edit an existing COI's details, click Home [Control Panel > Building Services > COI](#). Then select Tenant Certificates or Vendor Certificates, as applicable.



2. In the COI list, click the Certificate of Insurance link or double-click on the row to view a company's COI details.
3. The COI details are displayed. There are two major parts to the COI Details interface:

1	<p>COI General Information: displays title, tenant/vendor name, type and property</p> <p>COI Contact (vendor COI only): displays vendor contact information</p>
2	<p>Policies & Compliance Tab: displays valid signature and correct additional insured flags, Policies, and documents</p> <p>Messages Tab: displays Employee, tenant/vendor automatic notification times, custom signature, messages, reminders and notes.</p> <p>History Tab: displays a log of events (created, document uploaded, renewed, activated, deactivated, expired).</p>

Go Back Renew Deactivate

Certificate of Insurance

GENERAL INFORMATION

Title: Certificate of Insurance
 Vendor: A & M Elevator Company Inc.
 Type: Elevator Maintenance
 Property: Hillview Towers
 (Edit)

COI CONTACT

Name:
 Phone:
 Email: 1
 (Edit)

Policies & Compliance | Messages | History

COI has a valid signature: Yes
 COI has the correct [Additional Insured](#): Yes
 (Edit)
 Please consult the [Official Policy Requirements](#) for guidance on marking the policies as compliant or non-compliant.

Policies

Add Policy | Edit | Delete

Policy Type	Effective Date	Expiry Date	Minimum	Listed	
Insurance	Mar 21, 2011	Mar 21, 2012	2,000,000	2,000,000	✓

2

Documents

Add Document | Edit | Delete

COI.pdf
Mar 25, 2011

Please refer to the additional topics in this section for more specific information on editing COIs.

COI Information

The COI information section contains general information concerning the COI, as well as the Vendor contact information for Vendor COIs. These sections can be updated by clicking on the [\(Edit\)](#) links provided.

Go Back

Certificate of Insurance

GENERAL INFORMATION

Title: Certificate of Insurance
Vendor: A & M Elevator Company Inc.
Type: Elevator Maintenance
Property: Hillview Towers
[\(Edit\)](#)

COI CONTACT

Name:
Phone:
Email:
[\(Edit\)](#)

Policies

[Add Policy](#)

Policy Type
Insurance

The Policies & Compliance Tab

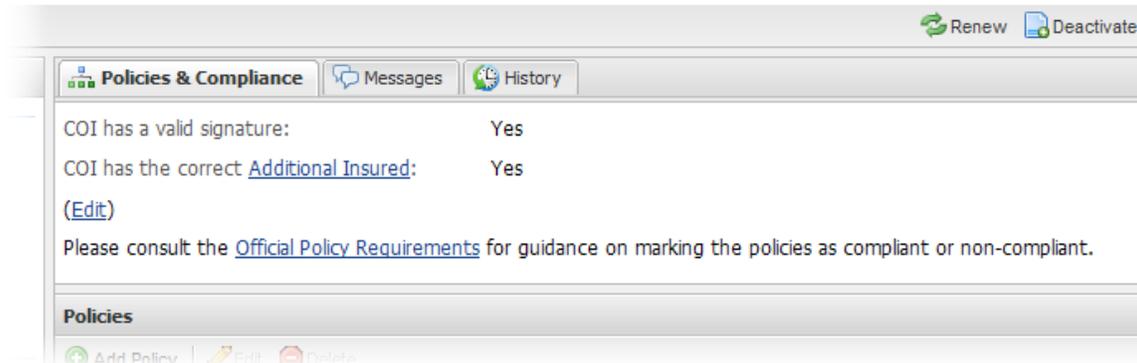
About Policies & Compliance:

The Policy & Compliance tab displays all information relevant to the compliancy of the COI:

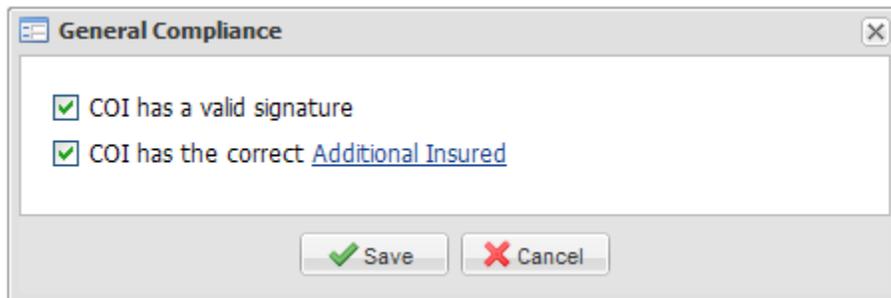
- **General Compliance**
 - Valid signature
 - Correct Additional Insured
- **Policies**
 - Effective Date & Expiry Date
 - Minimum and Listed Insured amounts
- **Documents**

General Compliance

This section of the Policies & Compliance tab is used to indicate if the **COI has a valid signature** and if the **COI has the correct Additional Insured**. By clicking on the links provided, you can also view the currently listed Additional Insured and view a copy of your company's official policy requirements if available.



1. Click the [\(Edit\)](#) link to modify the General Compliance section. Place or remove checkmarks beside **COI has a valid signature** and **COI has the correct Additional Insured** to indicate compliance or non-compliance, respectively.
2. Click **Save** to save your changes.



Policies

The Policies section displays information regarding the validity of each policy associated with the COI:

- **Policy Type**
- **Effective Date** and **Expiry Date**
- **Minimum** required and **Listed** insured amounts

Please consult the [Official Policy Requirements](#) for guidance on marking the policies as compliant or non-compliant.

Policies					
 Add Policy	 Edit	 Delete			
Policy Type	Effective Date	Expiry Date	Minimum	Listed	
Insurance	Mar 21, 2011	Mar 21, 2012	2,000,000	2,000,000	

Documents

 Add Document |  Edit |  Delete

Adding a Policy:

1. Click **Add Policy**. The COI Policy screen is displayed.

The screenshot shows a web application interface for managing policies. At the top, there is a 'Policies' header with three buttons: 'Add Policy' (highlighted with a red box), 'Edit', and 'Delete'. Below this is a 'COI Policy' form. The form contains the following fields:

- Policy Type:** A drop-down menu with 'General Liability' selected.
- Effective Date:** A date field with '03/31/2011' and a calendar icon.
- Expiry Date:** A date field with '03/31/2012' and a calendar icon.
- Minimum Amount:** A drop-down menu with '2,000,000' selected.
- Listed Amount:** A drop-down menu with '3,000,000' selected.
- Compliant:** Three radio buttons: 'Compliant' (selected), 'Not Compliant', and 'Waived'.
- Notes:** A text area with a scroll bar.

At the bottom of the form are two buttons: 'Save' (with a green checkmark icon) and 'Cancel' (with a red X icon).

2. Enter the following information:

- **Policy Type:** select a type from the drop-down menu, or enter in the first three characters of the policy type name and choose from a list of possible matches.
- **Effective Date:** click the calendar icon () and use the calendar interface provided to select the starting date for the policy's coverage.
- **Expiry Date:** by default, this is set to expire one year after the effective date. You can manually adjust this by clicking the calendar icon () and using the calendar interface provided.
- **Minimum Amount:** use the drop-down or manually enter the minimum dollar amount for compliance.
- **Listed Amount:** use the drop-down or manually enter in the actual dollar amount of coverage provided by the policy.
- **Compliant:** indicates whether the policy is **Compliant** or **Not Compliant**. The default setting is determined based on whether or not the **Listed Amount** is equal to or greater than the **Minimum Amount**. You can also select Waived if you choose to waive the requirements for this policy.
- **Notes:** enter any relevant additional information concerning the policy.

3. Click **Save**.

Editing a Policy:

1. Select a policy from the list and click **Edit Policy**. The COI Policy screen is displayed.

The screenshot shows a web application interface for editing a policy. At the top, there are three buttons: 'Add Policy' (with a plus icon), 'Edit' (with a pencil icon and highlighted by a red box), and 'Delete' (with a minus icon). Below these is a 'COI Policy' dialog box. The dialog has a title bar with a close button. Inside, the following fields are visible:

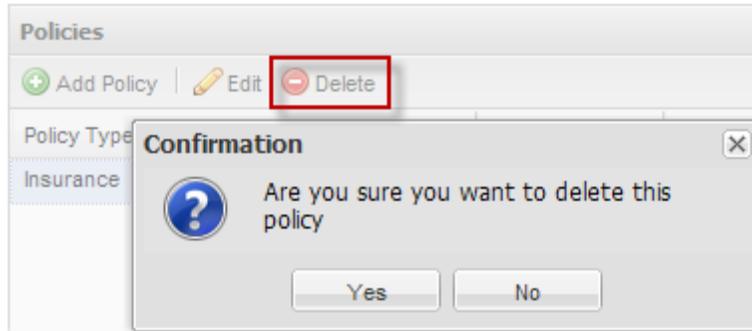
- Policy Type: General Liability (dropdown menu)
- Effective Date: 03/31/2011 (calendar icon)
- Expiry Date: 03/31/2012 (calendar icon)
- Minimum Amount: 2,000,000 (dropdown menu)
- Listed Amount: 3,000,000 (dropdown menu)
- Compliant: Compliant Not Compliant Waived
- Notes: (empty text area with scrollbars)

At the bottom of the dialog are two buttons: 'Save' (with a green checkmark icon) and 'Cancel' (with a red X icon).

2. Modify the policy information as needed.
3. Click **Save**.

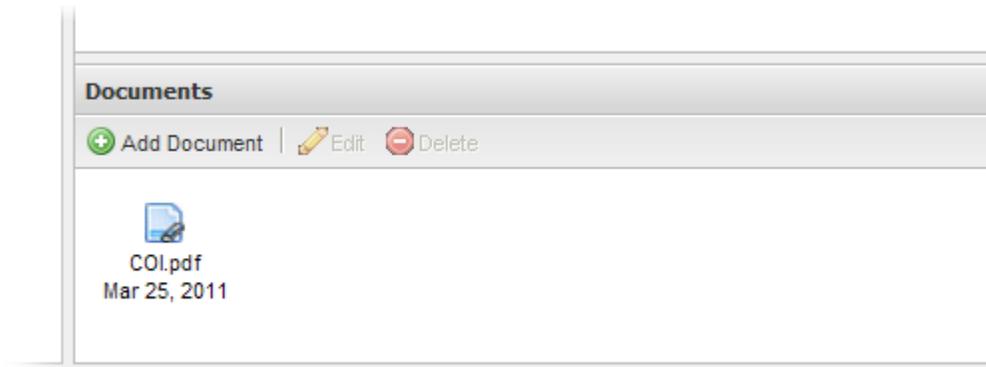
Deleting a Policy:

1. Select a policy from the list and click **Delete**.
2. In the confirmation popup that appears, click **Yes**.



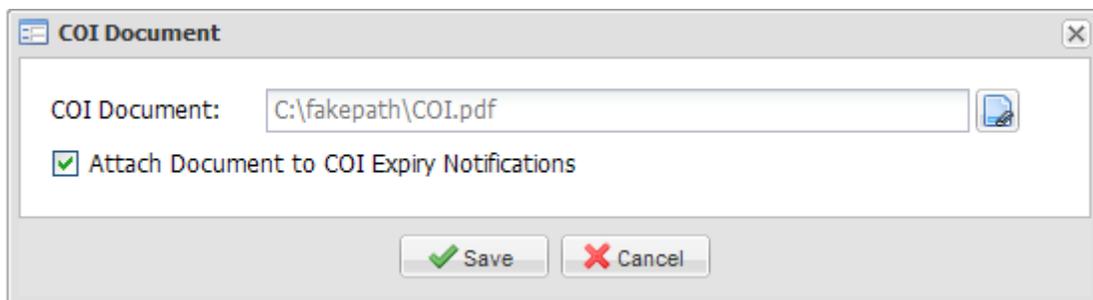
Documents

The documents section of the Policies & Compliance tab displays all files (such as PDFs) associated with the COI. The Documents interface can be used to add, delete, or edit properties for each file.



Adding a Document:

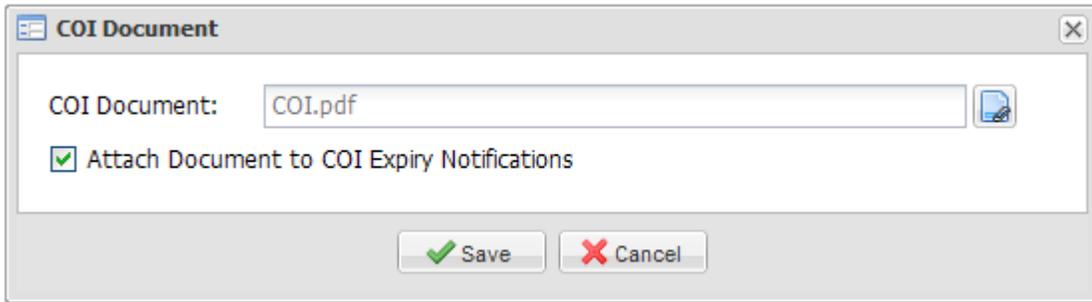
1. Click **Add Document**.
2. To locate the file you would like to upload, click the browse button () , select the file in the window that appears and click **Open**.
3. If you do not want the attachment to be sent with COI expiry notifications, remove the checkmark beside **Attach Document to COI Expiry Notifications**.
4. Click **Save** to add the file.



Editing a Document:

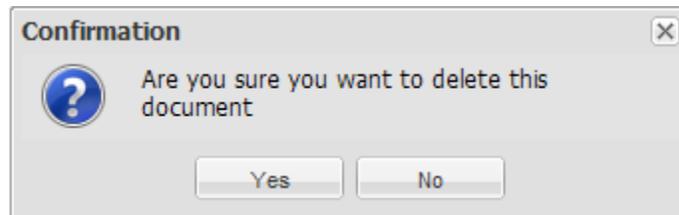
1. Select a document and click **Edit**.
2. Add or remove the remove the checkmark beside **Attach Document to COI Expiry Notifications** to indicate if you would like this document to be sent with expiry notifications.

3. Click **Save**.



Deleting a Document:

1. Select a document and click **Delete**.
2. In the confirmation popup that appears, click **Yes**.



The Messages Tab

About the Messages Tab:

The messages tab is used to manage incoming and outgoing COI-related messages, notes and reminders. Unread messages, notes and reminders are also displayed in the [Messages List](#).

The messages tab has two main sections: COI Expiry Notification settings, and Messages.

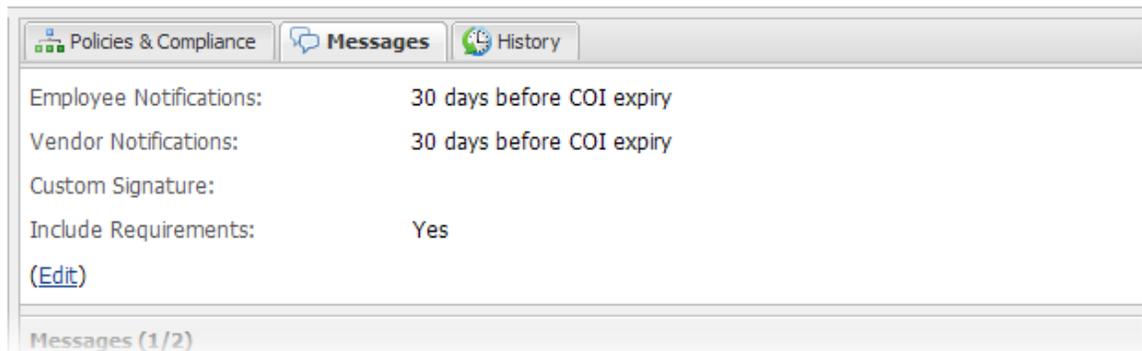
COI Expiry Notification:

The COI Expiry Notification is an email that is automatically sent to a vendor when their COI is about to expire. The COI Expiry Notification includes the Additional Insured that are to be included on the COI as well as the policy requirements.

Tenant Contacts can be selected to receive COI notifications. For that setup please contact your Axis Portal Support team.

The following details are displayed in this section:

- Employee Notification times
- Vendor/Tenant Notification times
- Custom Signature
- Include Requirements option



1. To edit the COI Expiry Notification options, click the [\(Edit\)](#) link.
2. In the COI Expiry Notification editor that opens, you can select the following options:
 - **Inform Employees:** indicate how many days before expiry that employees should be notified by email. The second notification timeframe is optional and

can be left blank. You can also set a date at which automatic notifications will no longer be sent; this field can be left blank if you do not want an end date.

- **Inform Vendor/Tenant:** indicate how many days before expiry that the vendor or tenant (as applicable) should be notified by email. The second notification timeframe is optional and can be left blank. You can also set a date at which automatic notifications will no longer be sent; this field can be left blank if you do not want an end date.
- **Custom Signature:** you can enter text in this field if you would like this COI to have a custom signature added to messages.
- **Include Requirements:** when this option is checked, the Policy Requirements document will be sent by default (you can include or discard this attachment when sending messages manually).

3. Click **Save** when you are finished.

COI Expiry Notification

Inform Employees 30 and 15 days before expiry until 04/01/2012

Inform Vendor 30 and 15 days before expiry until 04/01/2012

Custom Signature:

Include Requirements

Messages:

The Messages section displays messages, reminders and notes related to the COI.

Messages (2/4)

New Mark as Read Reply New Note/Reminder Edit Dismiss View

From	Subject	Date
Sheila Jackson	Review for non-compliance	Apr 1 at 1:01 pm
Sheila Jackson	Review attachment	Apr 1 at 12:56 pm
pv@amelevator.com	RE: COI Expiry Notification for A & M Elevator Company ...	Apr 1 at 11:57 am
Sheila Jackson	COI Expiry Notification for A & M Elevator Company Inc.	Apr 1 at 11:55 am

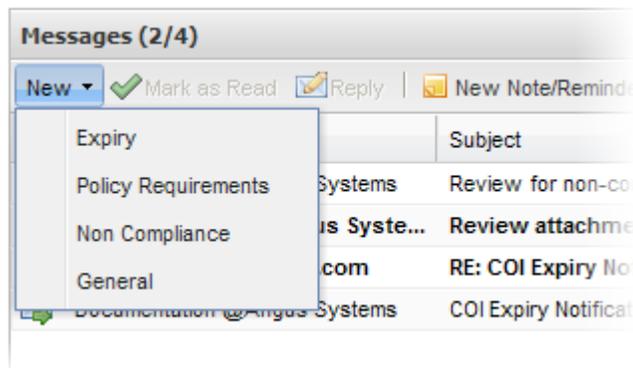
There are four different types of messages which can appear under this tab:

1. **Incoming Messages**
Messages that are received by email are displayed in this interface. Messages marked in bold are unread. Unread messages also appear in the [Messages list](#).
2.  **Outgoing messages**
Outgoing messages that are sent by email to one or more recipients and are tagged with a  icon.
3.  **Reminders**
Reminders are always displayed in bold and are not sent to an email recipient. Reminders can be used as a high-priority "to-do" note, which will also appear on the [Messages list](#).
4.  **Notes**
Notes are lower-priority reminders which are only displayed within the Messages tab of the work order they are associated with.

Sending a Message

You can manually send custom, template-based messages with attachments via the Messages tab.

1. Click **New** and select a message type from the list provided:
 - **Expiry**: send an expiry notification manually.
 - **Policy Requirements**: send a request for new policy documents (attaches policy requirements document)
 - **Non Compliance**: send a non-compliance notification.
 - **General**: send a custom message that does not use a template.



2. The New Message window will open. By default, the COI contact listed for the vendor or tenant is auto-filled. You can edit the **To** and **Cc** fields as desired; please note that to enter multiple email addresses into the **To** or **Cc** fields, additional email addresses must be separated with semicolons (;).
3. The **Subject** field is auto-filled based on the template type you selected (or blank if the **General** message type was used). You can edit this field as necessary.
4. The **Message** field is also auto-filled based on the template type you selected (or blank if the **General** message type was used). You can edit this field as necessary.
5. The default settings for what attachments will be sent are based on your attachment settings, defined in the Attachments section of the [Policy & Compliance tab](#) as well as in your COI Expiry Notifications options in the [Messages tab](#). You can override these defaults by placing or removing the checkmarks beside each document listed.
6. Click **Send** to send your message.

 **New Message** 

To:
Please separate email addresses with semicolons

Cc:
Please separate email addresses with semicolons

Subject:

Message:
Please contact us with any questions or concerns regardings this matter.

Sincerely,

Peter Parker
Phone: 416-385-8550"/>

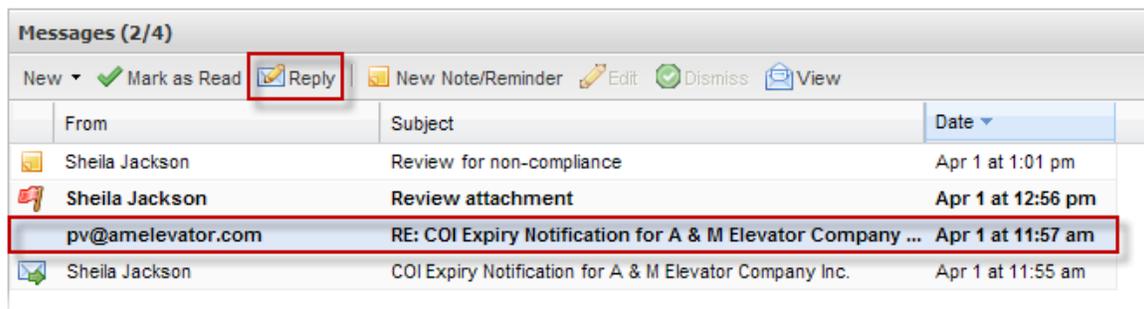
Attachments: COI.pdf Insurance.doc

Managing Replies

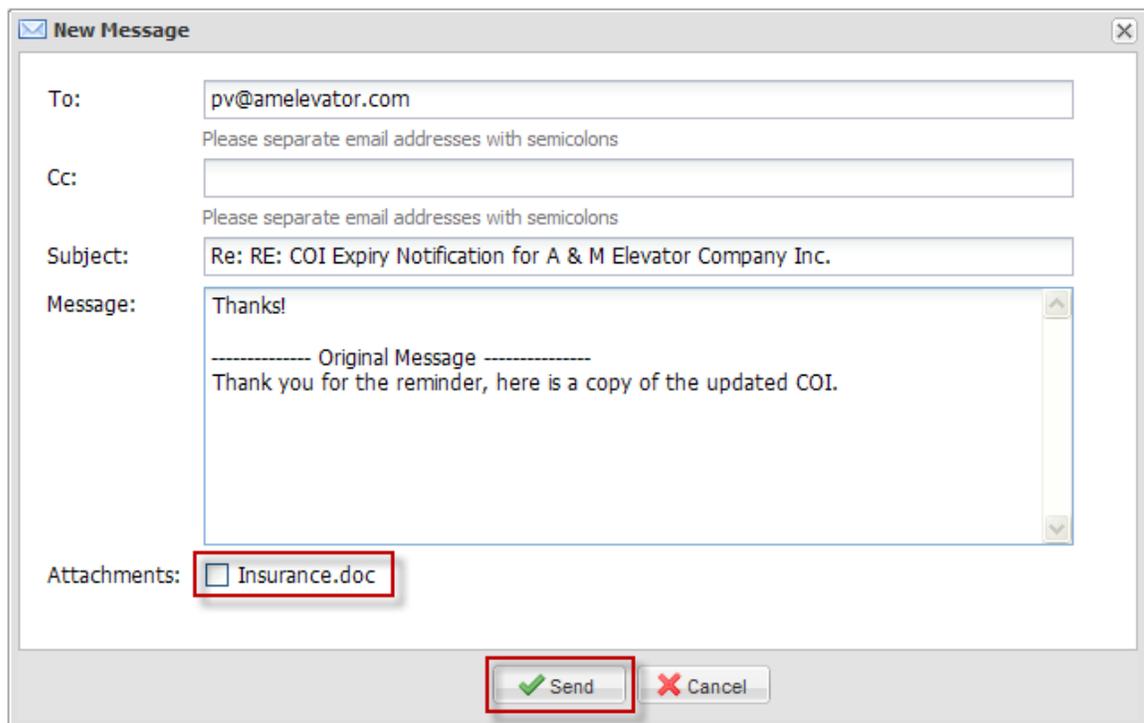
Unread received messages are marked in bold in the Messages tab. You can view and respond to read and unread messages, as well as move any received attachments into the COI's Documents section (located under the Policies & Compliance tab).

Replying to Messages:

1. To reply to a message, select the message and click **Reply**.

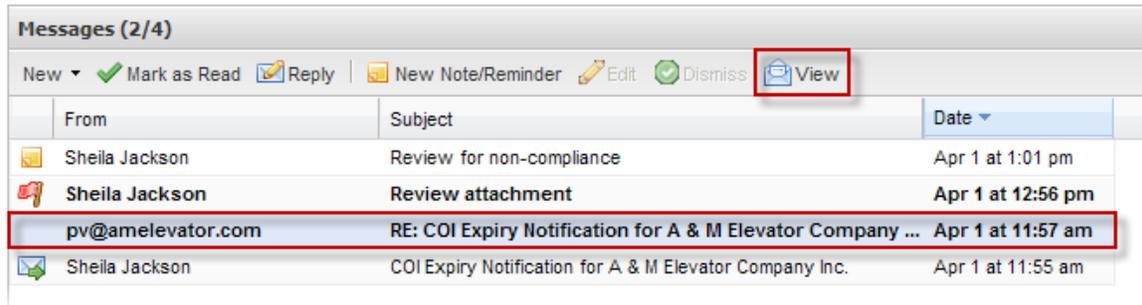


2. The New Message window opens with a copy of the original message included. Type in your response in the **Message** text area, place a checkmark beside any attachments you wish to include and click **Send**.

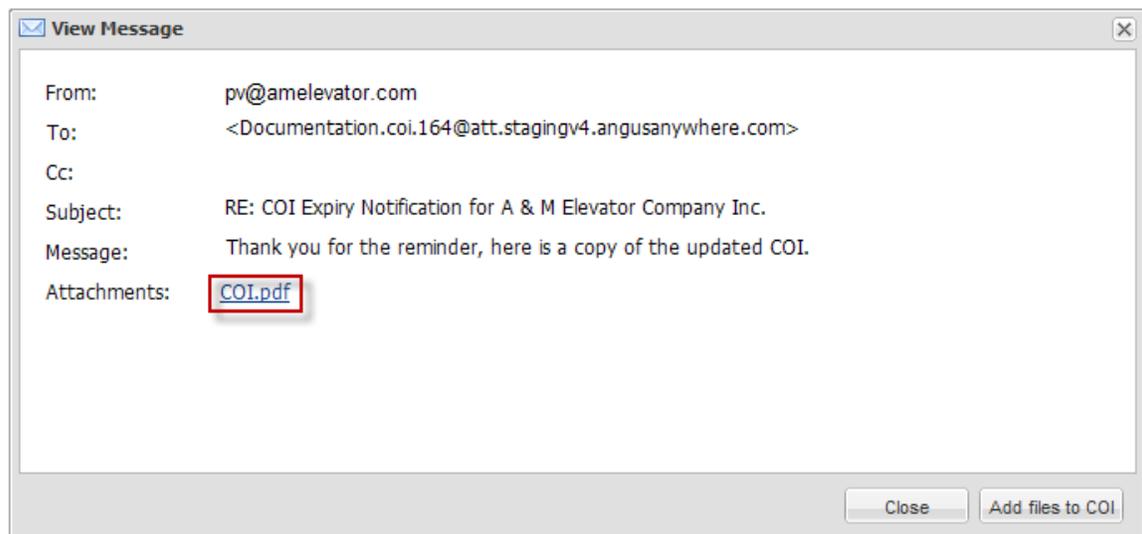


Adding Attachments to the COI:

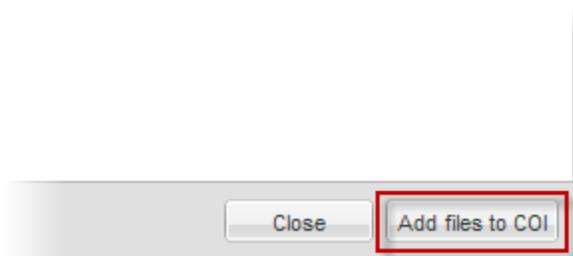
1. To view a message, double-click on the message, or select the message and click **View**.



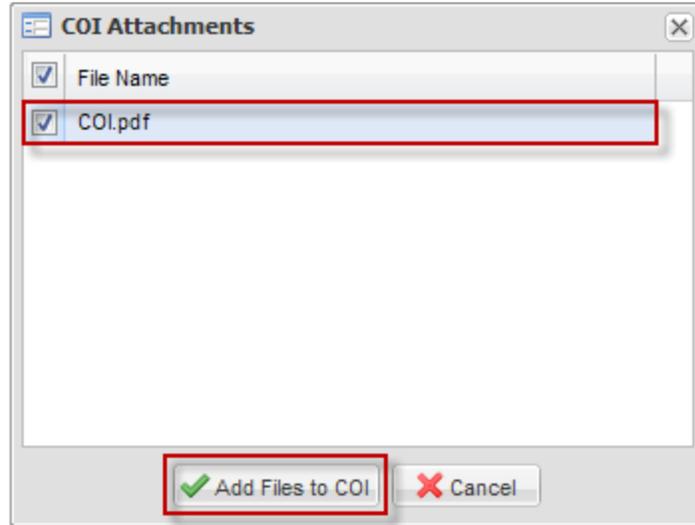
2. The message contents are displayed. You can view any attachments you have received by clicking on the attachment name(s).



3. You can add attachments to the COI's Documents section by clicking **Add files to COI**.



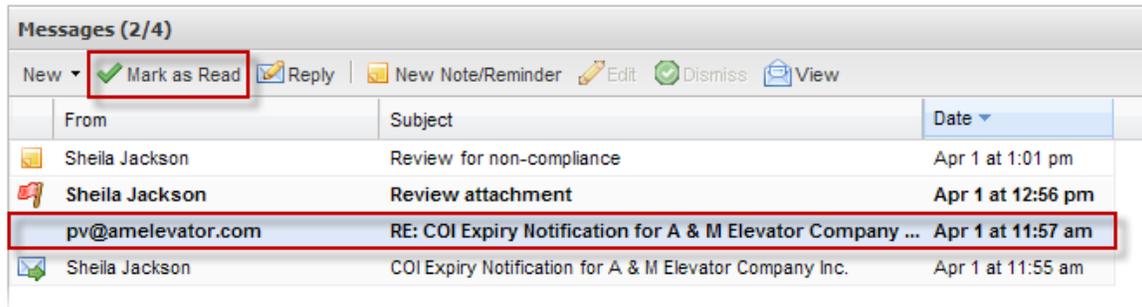
4. In the confirmation window that opens, place a checkmark beside the files you would like to add to the COI's documents section, then click **Add files to COI**.



Marking Messages as Read/ Unread

Marking Messages as Read:

To mark a message as read, select the message and then click Mark as Read. Messages that are marked as read will no longer appear in the [Messages list](#).

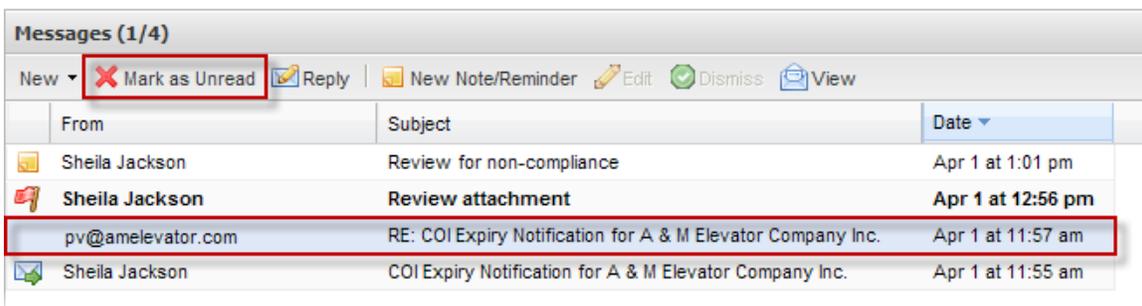


The screenshot shows a messages list interface. At the top, there is a toolbar with a 'New' dropdown, a 'Mark as Read' button (highlighted with a red box), a 'Reply' button, a 'New Note/Reminder' button, an 'Edit' button, a 'Dismiss' button, and a 'View' button. Below the toolbar is a table with columns for 'From', 'Subject', and 'Date'. The table contains four rows of messages. The third row, from 'pv@amelevator.com' with subject 'RE: COI Expiry Notification for A & M Elevator Company ...', is highlighted with a red border. The other rows are from 'Sheila Jackson'.

From	Subject	Date
Sheila Jackson	Review for non-compliance	Apr 1 at 1:01 pm
Sheila Jackson	Review attachment	Apr 1 at 12:56 pm
pv@amelevator.com	RE: COI Expiry Notification for A & M Elevator Company ...	Apr 1 at 11:57 am
Sheila Jackson	COI Expiry Notification for A & M Elevator Company Inc.	Apr 1 at 11:55 am

Marking Messages as Unread:

To mark a message as unread, select the message and then click Mark as Unread. Messages that are marked as unread will appear in the [Messages list](#).



The screenshot shows a messages list interface. At the top, there is a toolbar with a 'New' dropdown, a 'Mark as Unread' button (highlighted with a red box), a 'Reply' button, a 'New Note/Reminder' button, an 'Edit' button, a 'Dismiss' button, and a 'View' button. Below the toolbar is a table with columns for 'From', 'Subject', and 'Date'. The table contains four rows of messages. The third row, from 'pv@amelevator.com' with subject 'RE: COI Expiry Notification for A & M Elevator Company Inc.', is highlighted with a red border. The other rows are from 'Sheila Jackson'.

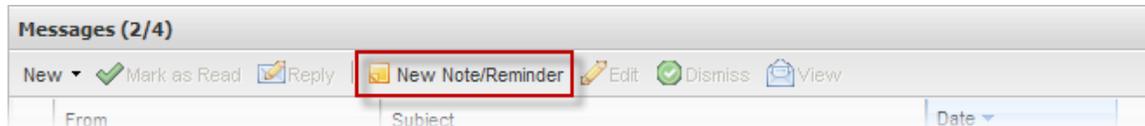
From	Subject	Date
Sheila Jackson	Review for non-compliance	Apr 1 at 1:01 pm
Sheila Jackson	Review attachment	Apr 1 at 12:56 pm
pv@amelevator.com	RE: COI Expiry Notification for A & M Elevator Company Inc.	Apr 1 at 11:57 am
Sheila Jackson	COI Expiry Notification for A & M Elevator Company Inc.	Apr 1 at 11:55 am

Using Notes

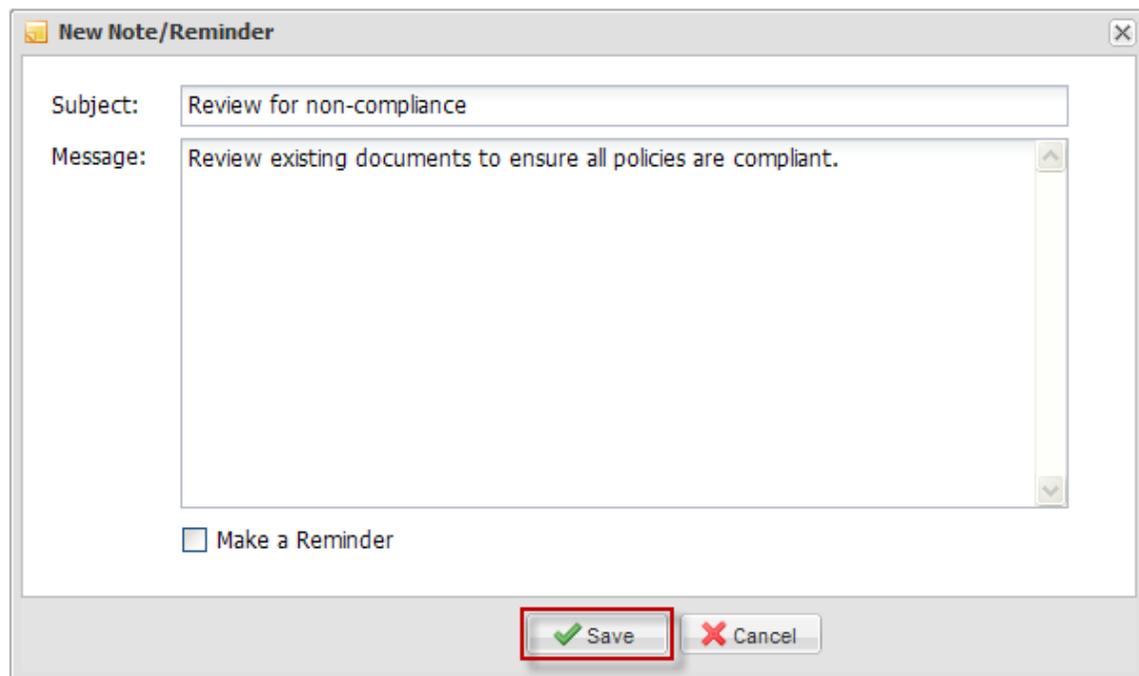
Notes are lower-priority reminders which are only displayed within the Messages tab of the COI they are associated with.

Creating a New Note:

1. Click **New Note/Reminder**. The New Note/Reminder popup window will open.



2. In the window that opens, enter a subject and a message for the note.
3. Click **Save**.



4. Your note will be displayed in the COI's Messages tab. All notes are marked with a  icon.

Editing a Note:

1. To edit a note, select the note you want to modify and click **Edit**. The Edit Note/Reminder popup window will be displayed.

Messages (1/4)

New ▾ × Mark as Unread ✉ Reply | 📅 New Note/Reminder ✎ Edit ✓ Dismiss 📧 View

From	Subject	Date
Sheila Jackson	Review for non-compliance	Apr 1 at 1:01 pm
Sheila Jackson	Review attachment	Apr 1 at 12:56 pm
pv@amelevator.com	RE: COI Expiry Notification for A & M Elevator Company Inc.	Apr 1 at 11:57 am
Sheila Jackson	COI Expiry Notification for A & M Elevator Company Inc.	Apr 1 at 11:55 am

2. In the Edit Note/Reminder window, modify the **Subject** and **Message** field as needed.
3. If you would like to convert the note into a reminder, place a checkmark beside **Make a Reminder**. See Using Reminders for more information.
4. Click **Save** to save your changes.

Edit Note/Reminder

Subject: Review for non-compliance

Message: Review existing documents to ensure all policies are compliant.

Make a Reminder

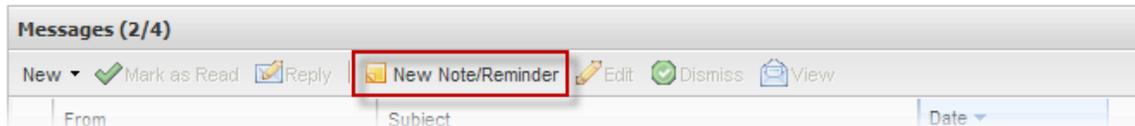
Save Cancel

Using Reminders

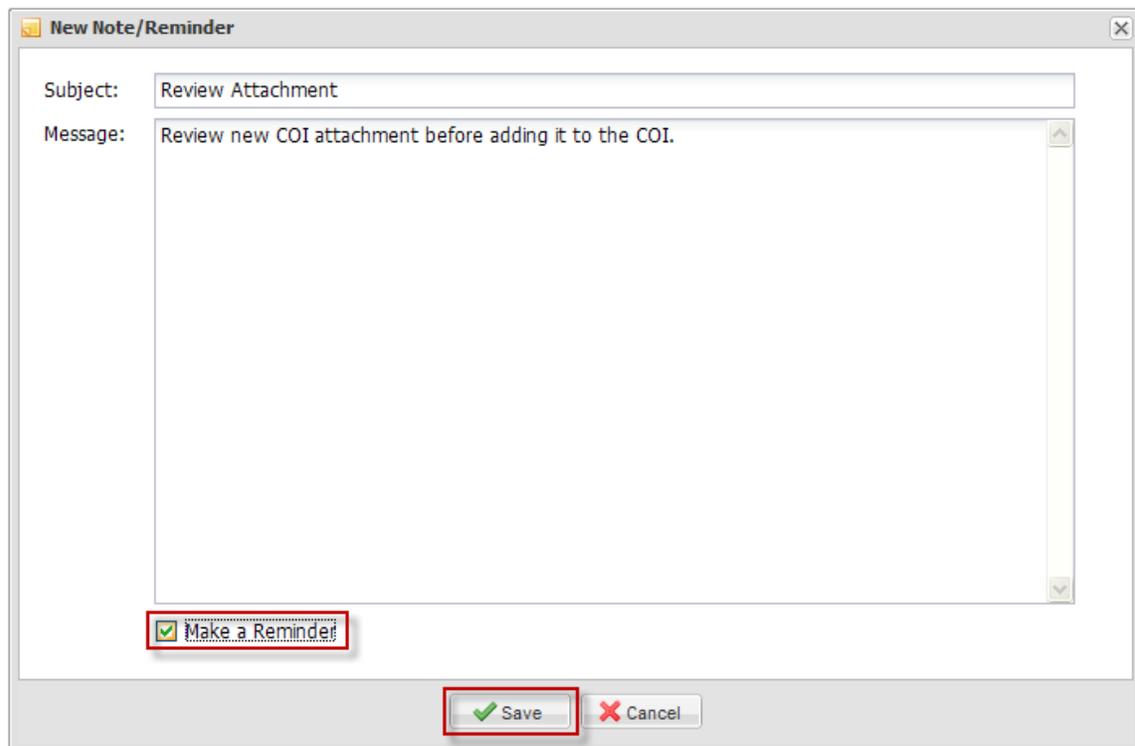
Reminders are always displayed in bold and are not sent to an email recipient. Reminders can be used as a high-priority "to-do" note, which will also appear on the Messages list.

Creating a New Reminder:

1. Click **New Note/Reminder**. The New Note/Reminder popup window will open.



2. In the window that opens, enter a subject and a message for the reminder.
3. Place a checkmark beside **Make a Reminder**.
4. Click **Save**.



5. Your reminder will be displayed in the COI's Messages tab, as well as in the Messages list. All reminders are marked with a 📌 icon.

Messages (2/4)

New ▾ Mark as Read Reply | New Note/Reminder Edit Dismiss View

From	Subject	Date ▾
Sheila Jackson	Review for non-compliance	Apr 1 at 1:01 pm
Sheila Jackson	Review attachment	Apr 1 at 12:56 pm
pv@amelevator.com	RE: COI Expiry Notification for A & M Elevator Company ...	Apr 1 at 11:57 am
Sheila Jackson	COI Expiry Notification for A & M Elevator Company Inc.	Apr 1 at 11:55 am

Dismissing a Reminder

If the reminder is no longer needed, you can dismiss the reminder. Dismissing a reminder converts it into a note, which is no longer displayed in bold text and will only be displayed within the Messages tab of the COI it is associated with (i.e. it will no longer be displayed in the Messages list).

To dismiss a reminder, select the reminder from the list and click **Dismiss**. Your reminder has now been converted into a note.

Messages (2/4)

New ▾ Mark as Read Reply | New Note/Reminder Edit Dismiss View

From	Subject	Date ▾
Sheila Jackson	Review for non-compliance	Apr 1 at 1:01 pm
Sheila Jackson	Review attachment	Apr 1 at 12:56 pm
pv@amelevator.com	RE: COI Expiry Notification for A & M Elevator Company ...	Apr 1 at 11:57 am
Sheila Jackson	COI Expiry Notification for A & M Elevator Company Inc.	Apr 1 at 11:55 am

Editing a Reminder

1. To edit a reminder, select the reminder you want to modify and click **Edit**. The Edit Note/Reminder popup window will be displayed.

Messages (2/4)

New ▾ Mark as Read Reply | New Note/Reminder Edit Dismiss View

From	Subject	Date ▾
Sheila Jackson	Review for non-compliance	Apr 1 at 1:01 pm
Sheila Jackson	Review attachment	Apr 1 at 12:56 pm
pv@amelevator.com	RE: COI Expiry Notification for A & M Elevator Company ...	Apr 1 at 11:57 am
Sheila Jackson	COI Expiry Notification for A & M Elevator Company Inc.	Apr 1 at 11:55 am

2. In the Edit Note/Reminder window, modify the **Subject** and **Message** field as needed.
3. If you would like to convert the reminder into a note, remove the checkmark beside **Make a Reminder**. See Using Notes for more information.
4. Click **Save** to save your changes.

Edit Note/Reminder

Subject: Review attachment

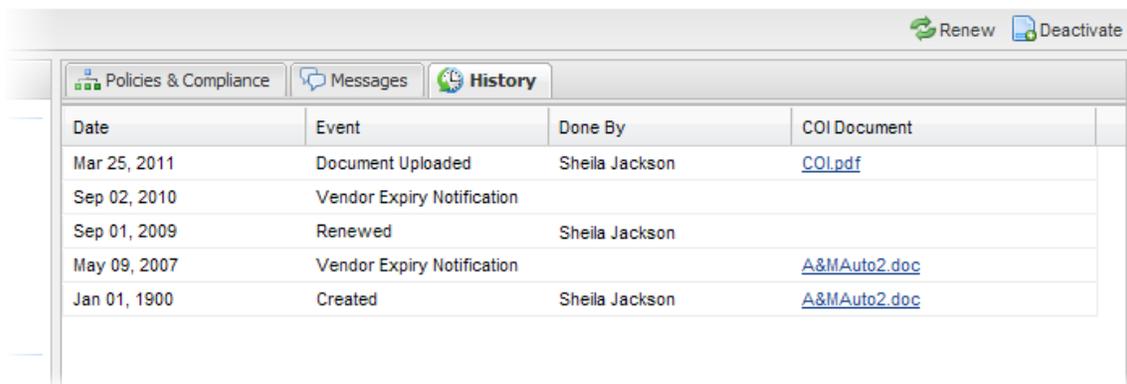
Message: Review new COI attachment before adding it to the COI.

Make a Reminder

The History Tab

This tab displays a record of important actions related to the COI. The history tab logs the following activities:

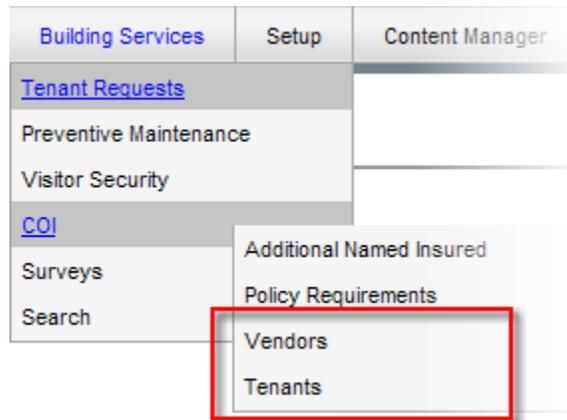
- Created
- Document uploaded
- Renewed
- Activated
- Deactivated
- Expired



Date	Event	Done By	COI Document
Mar 25, 2011	Document Uploaded	Sheila Jackson	COI.pdf
Sep 02, 2010	Vendor Expiry Notification		
Sep 01, 2009	Renewed	Sheila Jackson	
May 09, 2007	Vendor Expiry Notification		A&MAuto2.doc
Jan 01, 1900	Created	Sheila Jackson	A&MAuto2.doc

Renewing a COI

1. Click *Control Panel > Building Services > COI > Tenant/ Vendor*



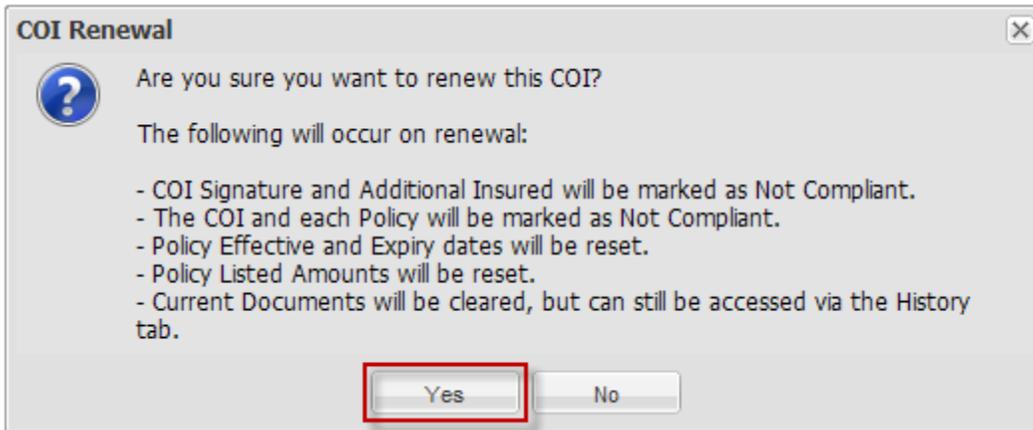
2. Locate the desired tenant or vendor and the COI to be renewed. Click the **Certificate of Insurance** link or double-click on the row to view the COI details.

The screenshot shows a table titled 'Vendor Certificates of Insurance'. At the top, there is a 'Property:' dropdown menu set to 'All Properties' and a 'New COI' button. Below the title, there are several filters: 'All Vendors' (with a close button), 'Active Certificates', 'Current and Expired', 'Compliant and Non-Compliant', and a 'Reset' button. The table has columns for 'Vendor', 'Certificate Name', 'Property', and 'Expiry Date'. The first row is highlighted with a red box and contains the following data: Vendor: 'A & M Elevator Company Inc.', Certificate Name: 'Certificate of Insurance', Property: 'Hillview Towers', Expiry Date: 'Mar 21, 2012'. Below this row, another row is partially visible with Vendor: 'A & M Elevator Company Inc.', Certificate Name: 'General Liability', Property: 'Hillview Towers', and Expiry Date: 'Mar 21, 2012'. Green checkmarks are visible in the right side of the rows.

3. Click **Renew**, located near the top-right corner of the screen.



4. In the confirmation popup that appears, click **Yes**.



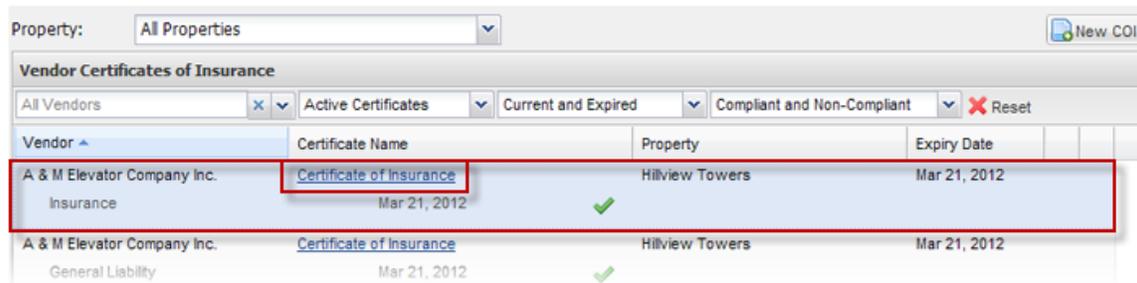
5. The following information will need to be updated in order for the COI to be valid:
 - COI Signature and Additional Insured
 - COI policy Listed amounts
 - New documents need to be attached
6. For more information on updating COIs, see [The Policies & Compliance Tab](#) topic.

Deactivating a COI

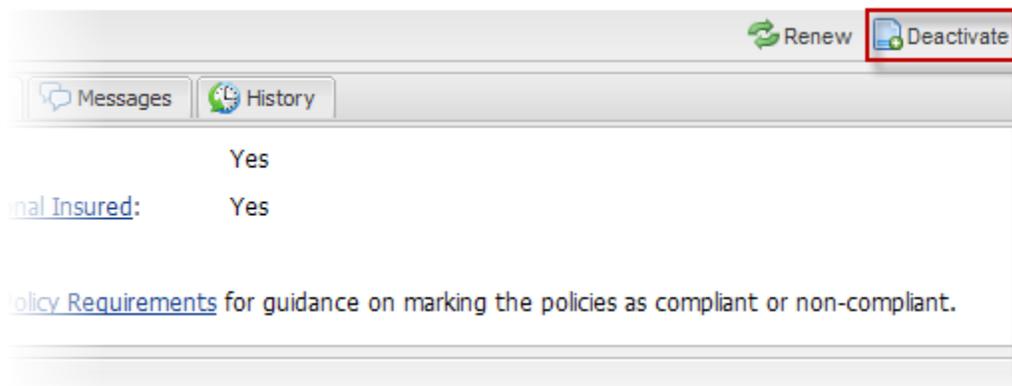
Tenant and vendor COI's can be deactivated when they are no longer valid.

To Deactivate a COI:

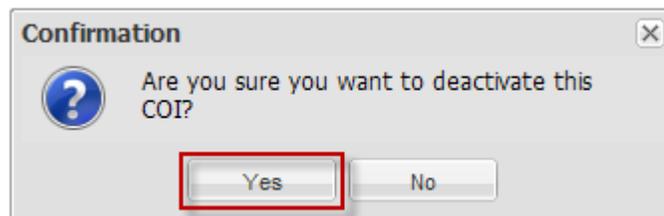
1. Click [Control Panel > Building Services > COI > Tenants/ Vendors](#)
2. Locate the desired tenant or vendor and the COI to be deactivated. Click the **Certificate of Insurance** link or double-click on the row to view the COI details.



3. Click **Deactivate**, located near the top-right corner of the screen.

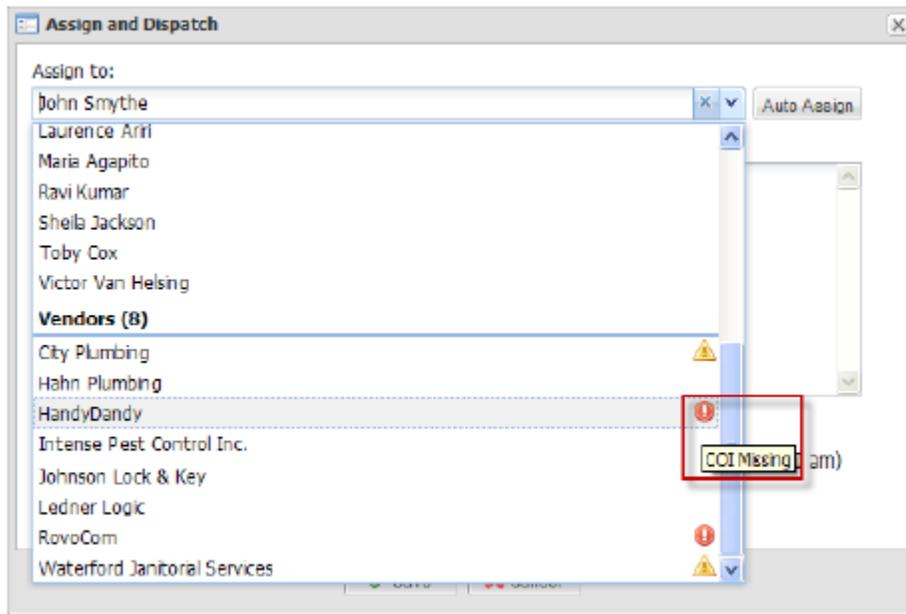


4. In the confirmation window that appears, click **Yes**. The COI is now deactivated.



COI and Assigning Work Orders

The COI Management tool assists Administrators in assigning Work Orders. The **Assign to** drop-down list in the Assignment section of **TR Work Orders** displays a note when a vendor's COI has expired or is missing.



This information helps Administrators make informed choices when assigning work orders, and also alerts them that COI updates are required.

- Vendors marked with a  indicates that the COI has expired.
- Vendors marked with a  indicates that the COI is missing.