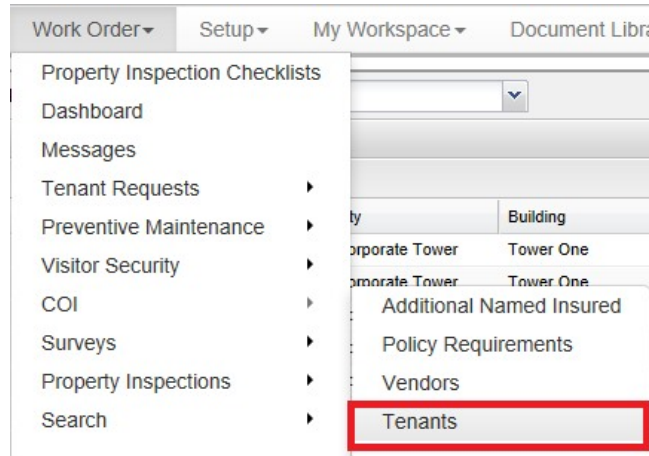
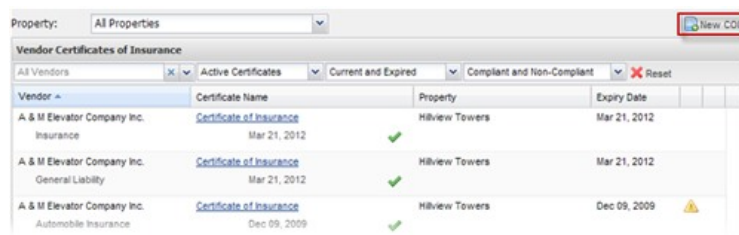




Add a Tenant COI

1. Click [Control Panel > Work Order > 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: Acme Graphics Inc.

Lease: ED-209- 1138

COI Title: Certificate of Insurance

Documentation

COI Document: C:\fakepath\COI.pdf

☒ Attach Document to COI Expiry Notification

Expiry Notifications

☒ Inform Employees 30 and 15 days before expiry until

☒ Inform Tenant 30 and 15 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 compliancy has been intentionally exempted by your company.)
- Notes

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

COI Policies & Compliance

Add Policy

COI Policy

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:

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](#).