RISK AND INSURANCE · RM.CERTIFICATES

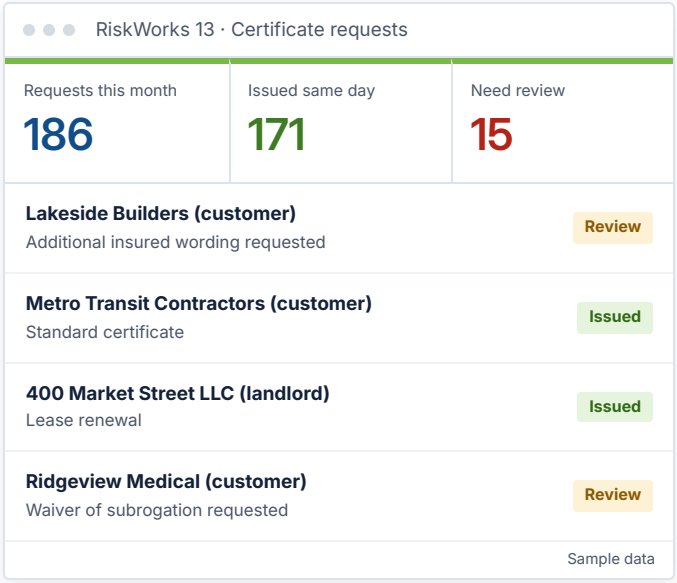
Certificate Issuance

Certificate of insurance issuance software

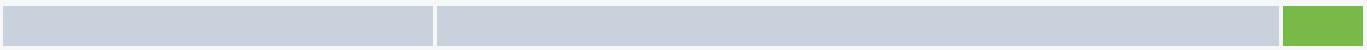
Issue, renew and distribute certificates of insurance to your customers on demand.

The problem

Customers, landlords and lenders ask for proof of insurance before work starts or a contract is signed. Each request goes to your broker by email and waits, many need special wording or endorsements, and every certificate must be reissued at renewal. At volume (Tyco handled over 40,000), it becomes a full-time job and slows sales.



WHERE IT HITS YOUR TOTAL COST OF RISK



Premiums 32%
Not directly affected.

Retained losses 62%
Not directly affected.

Cost to manage risk 6%
In this example, issuing certificates takes about 430 staff hours a year, roughly $31,000, before the broker time behind each request.

Typical split from the Exigis Risk Diagnostic's example, a public agency with a $1.2 billion budget. Take the diagnostic to see your own.

How it works

1. **Certificate requested**
2. **Template and holder selected**
3. **Certificate issued**
4. **Reissued to every holder at renewal**

Who uses it

Risk and insurance teams at companies whose customers require proof of insurance before they sign: contractors, suppliers and service providers.

Why Exigis

- Independent, privately owned and a certified minority business enterprise (MBE), since 2002
- SOC 2 Type II audited controls; no offshore staff
- Software plus Exigis specialists, at the service level you choose
- Clients include IBM, Pfizer, Mars, Honda, the Port Authority of New York and New Jersey, MTA and San Francisco International Airport

24	150,000+	11 years	4–8 weeks	95.8%
years running risk and insurance programs	insurance documents processed a year	our average client relationship	typical rollout, kickoff to go-live	customer retention

What it does

Self-service requests

Your sales and account teams request certificates through a simple form, 24 hours a day. Some programs let customers request their own.

Standard and non-standard

Standard requests are issued instantly; business rules route non-standard ones to the right reviewer.

ACORD, ISO and manuscript forms

Standard ACORD and ISO forms, plus manuscript templates such as evidence of self-insurance and memorandums of insurance.

Broker attestation

Your broker attests to new policy information, digitally or by hand, before it is used on certificates.

Templates and holders

Standard wording and a managed list of certificate holders: customers, landlords and lenders.

Endorsement library

Pick endorsements from a library, or include them automatically.

Auto ID cards

Auto ID cards for all 50 states, on demand.

Cover letters and delivery

Customizable cover letters, with delivery by email, fax or US mail.

Bulk renewal

Reissue certificates to every holder when policies renew.

Full record and reporting

A record of every request, approval and certificate issued, with ad-hoc reports on certificate, process and performance data.

> **"With the help of Exigis software, Tyco eliminated the manual handling of over 40,000 certificates of insurance and achieved aggressive ROI goals. We couldn't have done it without Exigis!"**
>
> Christian Heinisch · Risk Management, Tyco

Questions

Who issues the certificate?

RiskWorks produces ACORD and ISO certificates and manuscript documents. Before new policy information appears on a certificate, your broker attests to it, and the sign-off is kept in the document trail.

What happens at renewal?

Every active holder can be sent a new certificate in one batch when the policy renews.

Who can request certificates?

Usually your own sales and account teams, through a web form. Some programs also open the form to their customers.

Built on RiskWorks

Every application shares one platform, so adding a process means configuring an application, not buying another system.

Workflows · Business rules · Hierarchies · Role-based access · Documents and notices · Dashboards and reporting · Audit trail · RiskWorksAPI · AI document reading

Connected and supported

Integrations: Workday, Oracle, SAP Ariba, JD Edwards, PeopleSoft and MRI, and any other system through RiskWorksAPI.

Support: a single point of contact for your program, with live chat, email and phone support for your users and your third parties.

Security: SOC 2 Type II, named users only, and your data is never used to train outside AI models.

Start with the free Risk Diagnostic

your approximate total cost of risk, compared with your industry, then review it with an Exigis analyst at no cost.

exigis.com/risk-diagnostic

or call (800) 928-1963