



Certificate Management Solutions
Insurance Certificate Tracking & Issuance Services



Certificate Management Solutions

Requirements Questionnaire

Certificate Management Solutions
8725 West Higgins Road
Suite 485
Chicago, IL 60631
1-800-710-5010
info@cmstrack.com
www.certificatesolutions.com

Revolutionizing Certificate Tracking Technology

At CMS, we are committed to protecting your privacy and ensuring the safety of your personal information. Our Web sites use multiple security technologies to keep your information safeguarded.

Online Insurance Resources
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Date: _____

Company Name: _____

Contact Name: _____

Phone Number: _____

Address: _____

Contact Title: _____

Fax Number: _____

Requirements Questionnaire

1. Are you currently tracking insurance certificates?

☐ Yes ☐ No

a) If so, what platforms/software?

2. What is the estimated compliance rate of your insurance database file?

a) Does your system include current coverage expiration dates? ☐ Yes ☐ No

b) If you don't have an insurance database file, what is the percentage of which you have a current certificate on file?

3. Please check coverage types to be monitored:

☐ Automobile

☐ Commercial General Liability

☐ Garage Liability

☐ Liquor Liability

☐ Motor Cargo

☐ Pollution Liability

☐ Professional Insurance

☐ Property Insurance

☐ Umbrella/Excess Liability

☐ Workers' Compensation

☐ Other: _____

4. Please check categories of exposures to be monitored:

☐ Borrowers

☐ Concessionaires

☐ Construction Services

☐ Dealers

☐ Delivery/Transportation

☐ Franchises

☐ Installers

☐ Landlords

☐ Lessees

☐ Maintenance Contractors

☐ Merchandise/Product Vendors

☐ Service Providers

☐ Tenants

☐ Other: _____

5. Estimated total number of contractors/relationships to be tracked. _____



6. Are any contractors/relationships located outside of the United States? ☐ Yes ☐ No
a) If so, please estimate how many (by country). _____

7. Are there any division offices or subsidiaries whose logos/names must be included in outbound correspondence sent by CMS or whose names must be included as additional insured on incoming certificates? ☐ Yes ☐ No
a) If so, please provide an explanation. _____

8. Please check and specify your data source that will identify contractors/relationships requiring tracking.
☐ Internal Database File (specify platform/program) _____
☐ Accounts Payable File (specify platform/program) _____
☐ Existing Insurance Tracking System (specify platform/program) _____
☐ Other _____
9. Please check how you will inform CMS of new and terminated relationships?
☐ Automated (periodic data file update)
☐ Online via the Internet
☐ Manual (hardcopy notification)
10. Do you require A.M. Best Insurance company ratings and monitoring? ☐ Yes ☐ No
11. Do you require any modification to the standard cancellation clause language shown on the certificate? ☐ Yes ☐ No
12. Will the additional insured wording requirements be the same or vary for each vendor or requirement set. _____



13. Do you require that certificates contain confirmation of the ☐ Yes ☐ No

presence of specific provisions that are included as part of the policy maintained by the insured? (Examples: add back of XCU exclusion, specifically states contractual liability is part of G/L coverage)

If so please explain.

14. Do you require that evidence of coverage show your organization as an additional insured? ☐ Yes ☐ No

If so, is including an additional insured statement on the face of the certificate acceptable or do you require a "stand-alone" additional insured endorsement attached with the certificate?

15. Are there any special requirements/processes we need to be aware of? ☐ Yes ☐ No

If so please explain.

PLEASE EMAIL OR FAX THE COMPLETED QUESTIONNAIRE, ALONG WITH A DOCUMENT CONTAINING YOUR CURRENT INSURANCE REQUIREMENTS TO:

Walt Corigliano, Certificate Management Solutions

E-mail: wcorigliano@cmstrack.com

Fax: (773) 329-4294

PLEASE CALL ME IF YOU HAVE QUESTIONS: Walt Corigliano, (773) 632-5010



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Revolutionizing Certificate Tracking Technology

Now you know there is a better way to manage certificates of insurance.

- Find out how to get your company on board.
- Contact us for more information about Certificate Management Solutions.

Telephone

1.800.994.9440

E-mail

cms@cmstrack.com

Web

www.certificatesolutions.com