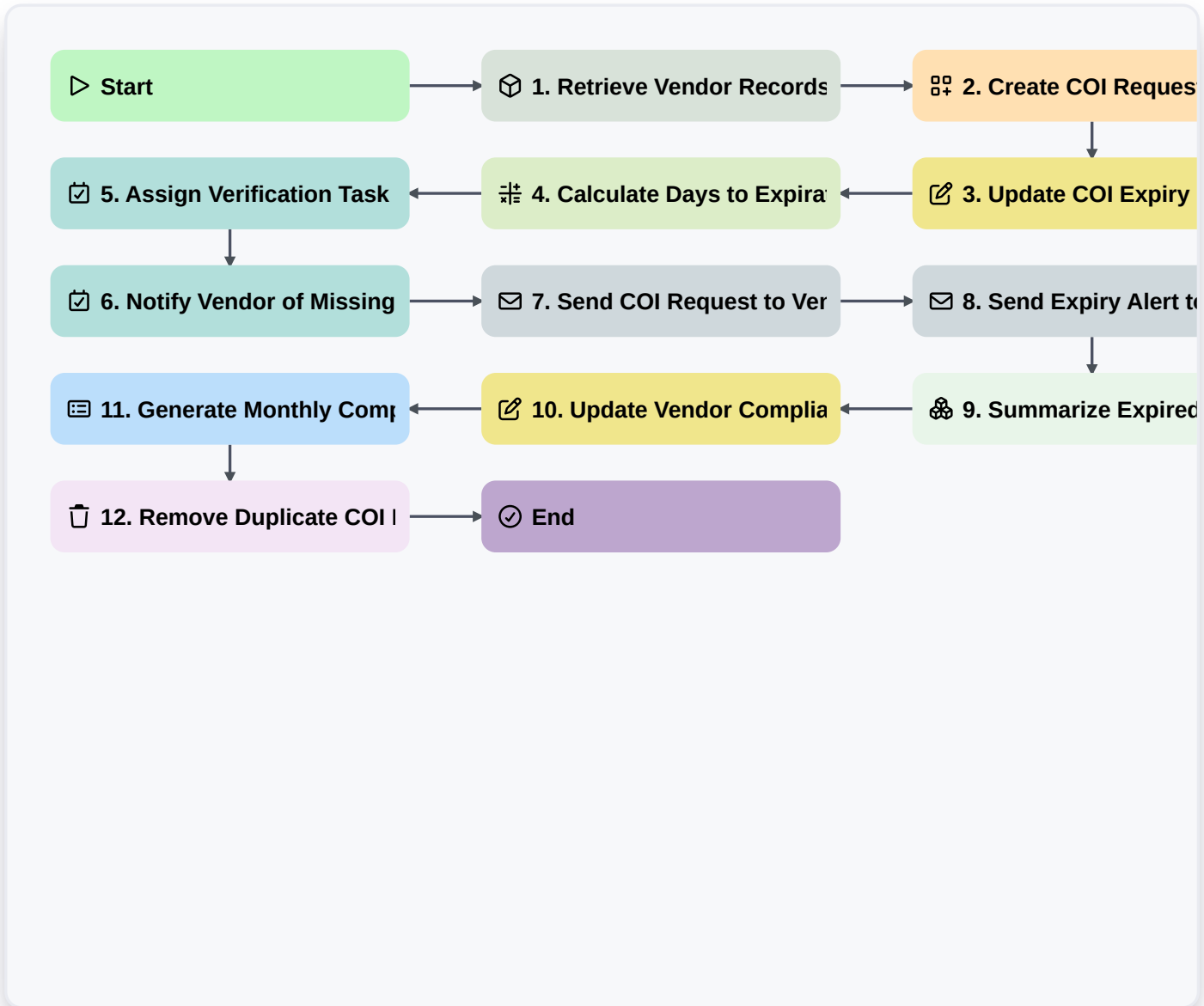


Certificate Of Insurance (COI) Tracking Process



Start

Start of the Workflow/Process.

1. Retrieve Vendor Records

Fetch existing vendor entries from the Vendor Data Model to check for existing COI history.

2. Create COI Request Entry

Create a new entry in the COI Tracking Data Model to initiate the tracking of a new certificate.

3. Update COI Expiry Date

Update the specific COI entry with the new expiration date once the certificate is verified.

4. Calculate Days to Expiration

Calculate the difference between the current date and the COI expiration date to determine urgency.

5. Assign Verification Task

Create a task for the Risk Management Officer to review the uploaded document for compliance.

6. Notify Vendor of Missing Info

Create a task for the Procurement Agent to follow up with the vendor regarding incomplete documentation.



✉ **7. Send COI Request to Vendor**

Send an automated email to the vendor contact requesting the updated Certificate of Insurance.

✉ **8. Send Expiry Alert to Stakeholders**

Send an email notification to internal project managers when a vendor's COI is approaching expiration.

🔗 **9. Summarize Expired Certificates**

Aggregate the count of COI entries where the expiration date is in the past to identify high-risk vendors.

✍ **10. Update Vendor Compliance Status**

Update the Vendor Data Model to change the 'Compliance Status' to 'Active' or 'Non-Compliant' based on COI validity.

📄 **11. Generate Monthly Compliance Report**

Create a report summarizing all COI renewals processed and all expired certificates during the month.

🗑 **12. Remove Duplicate COI Entries**

Delete erroneous or duplicate COI entries identified during the verification process.

🏁 **End**

End of the Workflow/Process.