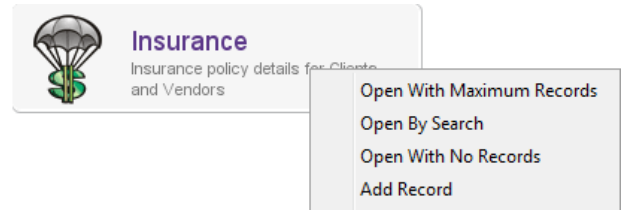AWAREMANAGER

To access Insurance from the console choose the **Agreements** tab and then **Insurance**.
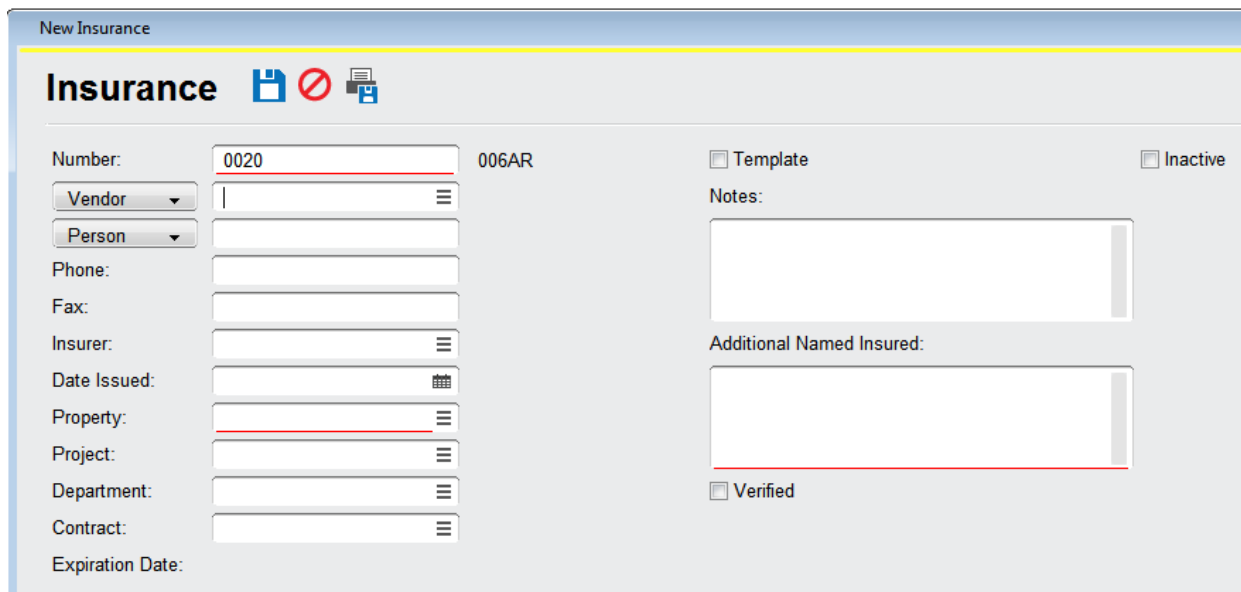
Right click the Insurance module for a list of options:

- **Open By Search:** allows you to customize a search.

  For example: search for all vendor certificates that expire this month

- **Open With No Records:** opens up a blank Insurance Certificate list.

- **Open with Maximum Records:** opens your Insurance Module with the maximum amount of insurance certificate records (including Inactive records).

- **Add Record:** quickly add a new insurance certificate.

- You may notice that some fields within the insurance certificate have a red underline. These fields are mandatory and must have a value filled out in order to save the record.

- Use the list icon at the end of certain fields to show a list of those records you have to choose from. You can also access this list by entering any letter into the field and using your down arrow key on your keyboard.

- Use the calendar icon at the end of certain fields to show a calendar to select a date.

Hint: If the Vendor/Tenant you are adding is not in the list already in the system for the insurance certificate you are trying to enter, you can add this Vendor/Tenant record on the fly by clicking on the plus icon in the chooser window.

AWAREMANAGER

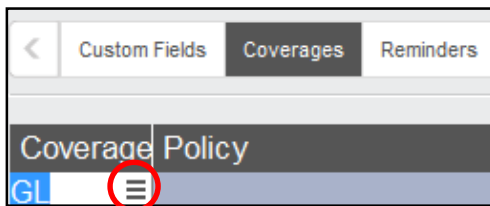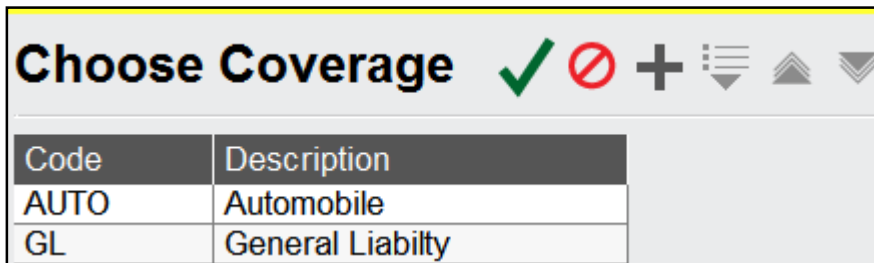| Number	The AwareManager defaults a number (similar to the *Work* file)
Vendor/Tenant	Select Vendor or Tenant
Contact	The Vendor or Tenant Contact - defaults from the record or you can select from the chooser
Phone	Defaults from the Vendor/Tenant record
Fax	Defaults from the Vendor/Tenant record
Insurer	This links to the Insurer capsule
Date issued	The issue date of the certificate
Building/Project/Contract	Enter if applicable for the certificate
Inactive	You can use the inactive feature to denote that a certificate is no longer valid. The Notes field can be used to record why the record is marked inactive.
Template	This can be used to indicate if a record is a template
Notes	This can record any notes related to the insurance certificates
Additionally Named Insured	Enter the information as it appears on the certificate Note: You can also list the certificate holder
Verified Checkbox	Use this checkbox to indicate the IC additionally insured information is correct on your hard copy Insurance Certificate. This information is tracked in the Insurance Certificate Advisory Report.
Expiration Date	This field calculates based upon the information in the coverage detail list

Entering In Coverages

Coverage	Policy			In Force From	In Force To	Occurrence	Limit Amount	Required Am	Insurer
							$0.00	$0.00	

Use the Coverages tab to enter in your Policy details for your insurance certificate, such as General Liability, Automobile Liability and Worker's Compensation.
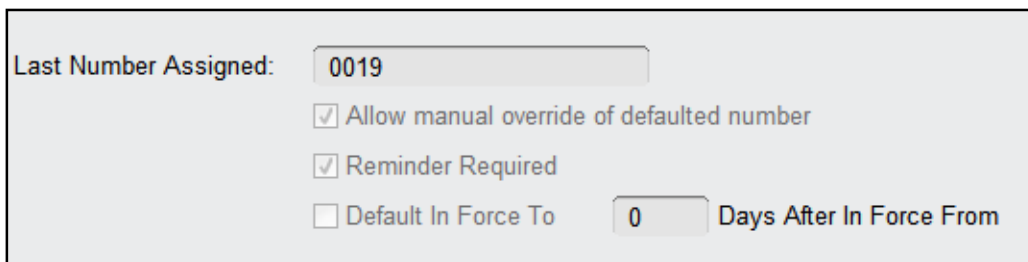
You have the option to choose your coverage from the list. To view this list place your cursor in the coverage field and select any letter. Then hit the list icon to the right of your choice or use the down arrow key on your keyboard.

Here you have the option to: add a new coverage (based on your permission level), widen your columns or add in additional columns to your view.

Code	Description
AUTO	Automobile
GL	General Liabilty

- **To add a new coverage type** click on the plus icon.

- **To widen columns** click on the line between the columns and drag.

- **To add a new column** right click on the line in between columns and choose the column to add.

The Preferences menu has an option to add a specified number of days to calculate the **In Force To** (End date) based on the **In Force From** (Start date). Right-clicking on the Insurance capsule and going to Preferences, you can check to have this option enabled and enter in the default number of days the **In Force To** date will be based on the **In Force From** date.

Last Number Assigned:	0019

☑ Allow manual override of defaulted number

☑ Reminder Required

☐ Default In Force To   0   Days After In Force From

Entering In Custom Fields

External File	The Insurance Certificate should be scanned and saved. The file path should then be entered into the External File Path field. **NOTE: if you move the file to a different location the link will not work.**

Template Insurance Certificate Records

You can enter in a template record to give you a head start for entering in Vendor and Tenant insurance records. A record is considered a template if it has the *Template* checkbox selected.

It might make sense to create separate ones for Tenants, Group 1 Vendors, and Group 2 Vendors.

Duplicating Template Insurance Certificate Records

Once you have created your Templates, you can quickly add new ones using the **Duplicate** icon.

1. Find the Template you wish to duplicate (Hint: search by **Template** = Yes to Yes)
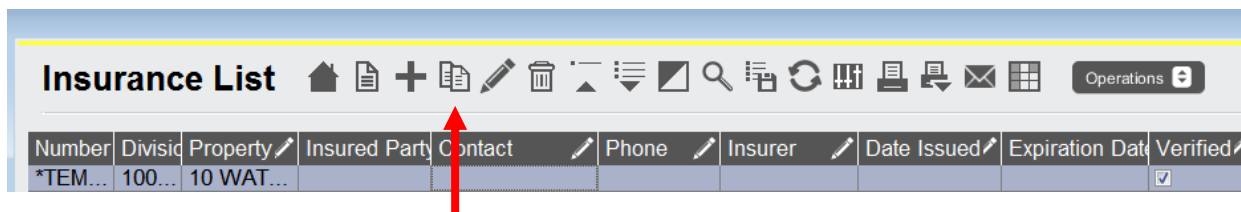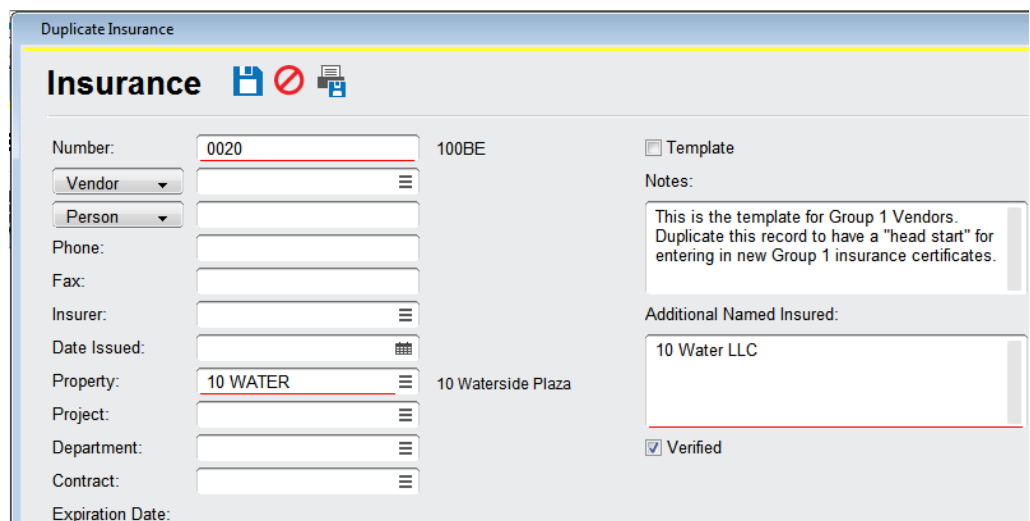
2. Select the Template record you wish to duplicate.

3. Click the Duplicate icon.

4. Enter in your new **Certificate of Insurance**; you can tell this is a new record because AwareManager automatically gives you an insurance certificate number and the template check box is not checked (meaning this is **not** a template record).

Frequently Asked Questions

- **I see a field for Expiration Date, but I cannot access this, how does this work?**

The expiration date in AwareManager automatically calculates to display the earliest expiring coverage portion of your Insurance Certificate. AwareManager does this for you based on the In Force dates you have put in your coverages table.

- **Should I enter in every instance of an Insurance certificate for each Vendor and Tenant or override the one that is already in there?**

That is up to your organization to decide. If, for example, you enter in each instance of a certificate of insurance for a vendor that you have had certificates from for the last 5 years, you will be able to generate reports using all of the certificates or some of the certificate that are in the system. You would make each expired certificate inactive and only keep the current certificate as active.

If you override the certificate of insurance each time you receive a new certificate, you will have only one record in the system with the current information. You would not be able to generate reports on the past 5 years worth of certificates because you are not keeping this information within AwareManager, only the current certificate.

- **What value does the Additional Insured "Verified" check box have and how do I use it?**

Checking the verified check box means that the additional insured information on the insurance certificate meets property standards and the insured party is allowed in the building.

Additional Named Insured:

AwareManager Management Service Company
100 Beacon Street LLC

☑ Verified

This value also shows in the Insurance Discrepancy report as well as any required amounts for coverages that are not met. In this example for Insurance Certificate number 2, the values that have been flagged are the required amount that was not met for Umbrella Liability as well as non-verified additionally insured information.

Insurance Discrepancy Report
Database International Group

AwareManager | jxt

Number	Insured Party Coverage	Name Policy	Phone	Insurer In Force From	Contact In Force To		Building Amount	Required
1	DELI	Deli in the Lobby				BB		
	GL	1234567		Jul 7 09	Jul 7 10		$5,000,000	$3,000,000
	UL	456788876okl		Jul 7 09	Jul 7 10		$1,000,000	$1,000,000
	WC	nyc456787		Jul 7 09	Jul 10 09		$0	$0
2	ABC	America's Book Club				LR		
	GL	123406-85908		May 31 09	May 31 10		$5,000,000	$1,000,000
	FIRE	1233455673egaw		May 31 09	May 31 10		$1,000,000	$0
$	UL	umb1234678		May 17 09	May 17 10		$40,000	$3,000,000
NOT VERIFIED	Additional Insured:	Low Rise Tower, Inc						