



ProTrac+[®]

Created by
DataTracPlus, LLC



ProTrac+[®] Capabilities

- **Easy Data Entry From**
 - **Scanner**
 - **Keyboard**
- **Compares Data to Requirements**
- **Determines Deficiencies**
- **Automatically generates**
 - **Letters**
 - **Reports**
- **Creates Audit Trails**



Set Up Screens

- **All Modules**
 - **Company User Names and Rights**
 - **For Each Project:**
 - **Name, Location, & Company Personnel**
 - **Limits & Coverage Requirements**
 - **Additional Insured Names**
 - **Letters of Credit and Bonds**
 - **Bond Requirements**
 - **List of Bond Contacts**

The Project Screens

Using The Software

Users will be able to reach and use features of the software from the Project Screens.

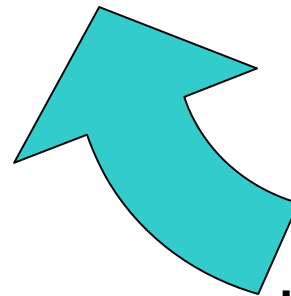
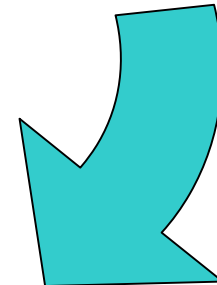
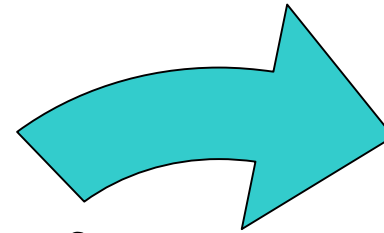
Users will have rights to certain parts of the software depending on their responsibilities.

Certificates of Insurance

Contractor Controlled Insurance

Project Name

Bonds and Letters of Credit





Scanning with OCR

- **The Software:**
 - **Scans and Reads Certain Data**
 - **Creates and Replaces Records**
 - **Saves Scanned Document Images**
 - **Certificates and Endorsements**
 - **Bonds and Letters of Credit**
 - **All Other Scanned Documents**
 - **Associates Each Image with a Project and/or Insured**



Tracking Insurance Records

- **Insurance Module Will Track:**
 - **Certificates**
 - **Receipt of Certificate**
 - **Certificate Deficiencies**
 - **Additional Insureds**
 - **Certificate Holder Name**
 - **Endorsements**
 - **Expiration Dates**
 - **Cancellation Notices**
 - **Contractor Controlled Insurance**
 - **Receipt of Forms**
 - **Enrollment Status**
 - **Calculate Insurance Credit**



Tracking Bond Records

- **Bonds Module Will Track**
 - **Purpose of Bond**
 - **Obligee Requiring the Bond**
 - **Bond Amounts**
 - **Original and Amended**
 - **Estimated Annual Premium**
 - **Calculate Bond Contingency**
 - **Bond Amount less \$ times % Complete**
 - **Issue and Expiration Dates**
 - **% of Contingency Required**
 - **Project Expected Completion Date**



Insurance Communication

- **Insurance Letters:**
 - **Standard and Custom**
 - **User Controls Wording**
 - **Generates Automatically to:**
 - **Subcontractors and Other Insureds**
 - **2 Request Documents and Forms**
 - **4 Deficiency Letters**
 - **1 Request Renewal**
 - **Saves Record to Letter History**



Bond Communication

- **The Following Forms will be Generated with Appropriate Letters**
 - **Irrevocable Standby Letter of Credit**
 - **Surety Performance Bond**
 - **Corporate Acknowledgement Form**
 - **Signature Verification Form**
 - **Escrow Bond**



Insurance Reports

- **Certificates**
 - **Expired Insurance**
 - **Insufficient Limits**
 - **Improper Additional Insured**
 - **Insured Summary**
 - **Project Summary**
- **Contractor Controlled Insurance**
 - **Intent Letters Sent**
 - **Forms Received/Deficient**
 - **Enrolled Subcontractors**
 - **Project Summary**



Bond Reports

- **Bonds & Letters of Credit**
 - **Master Bond Schedule**
 - **Letters of Credit & Surety Bond Summary**
 - **Subdivision Bonds and Letters of Credit**
 - **Cancelled Bonds**
 - **Surety Broker Open Items**
 - **Accounting Reclassification**
 - **Escrow Bond Calculation**



Field Reports

- **Field Personnel will have access to Reports of Subcontractors Insurance Status without being able to enter or edit data.**



Contact Us

To find out more about ProTrac+® or to schedule an Internet program demonstration, please contact Emily Brown at (800) 379-9055 or E-mail us at info@datatracplus.com



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