

CLIENT SOFTWARE OVERVIEW



Boost Efficiency, Contain Costs

Since 2002, we've developed custom software to simplify the wrap-up process. Our top-tier, proprietary technology boosts efficiency and contains costs.

We offer these industry-leading resources to administrators, brokers, wrap-up clients, carriers, and contractors: CR-Insight®, Contractor Toolbox, Carrier-Insight, GateKeeper App and WrapSheet.

Software Launches

- 2002: Software Development Begins
- 2009: Certificate Tracking
- 2011: Online Payroll
- 2012: Online Enrollment & Carrier-Insight
- 2013: Bulk Renewal, Report Automation Tool & Document Repository Enhancements
- 2014: GateKeeper App
- 2015: Complete Redesign
- 2016: Contractor Toolbox & WrapSheet
- 2017: Strategic Capital Investment Received

- Our proprietary automated approach ensures that the entire wrap-up process is managed at peak efficiency.

CR-Insight®

Core Technology

At the core of our technology is CR-Insight®, a wrap-up management software that provides controlled insurance program administrators a flexible, comprehensive tool to manage their projects - at any level of detail.

Your Wrap-Up Guide

Guides you through administrating wrap-ups from tailoring the project specific requirements to managing the life of each individual contract.

Automation

Detailed insurance calculation and audit trail shows the evolution of the value from estimate to final taken credit.

CR-Insight® will *chase down* enrollment forms, payroll, offsite certificates, and even rating pages for you.

Automates processes wherever possible, alleviating repetitive tasks allowing for high level administration.

Features hierarchy with color coded icons that display how a whole project is doing down to the contract level.

Library

Equipped with a library of 25 reports to choose from.

With CR-Insight®

You've got an eye on all the action in your project.

Contractor Toolbox

Payroll

The Contractor Toolbox lets contractors enroll and report payroll online, view historical payroll entries, and view and download previously issued certificates of insurance. They can also send notice that their work on site is complete.

Accuracy

This is handy for contractors, but possibly more so for administrators. The online feature replaces hand-filled paper forms with electronic submissions by the contractor – transforming and streamlining the process. Increasing velocity without compromising accuracy

Saves Time

Electronic submission removes the burden of data entry and correspondence required for thousands of enrollment forms and follow-ups, thousands of payroll entries and requests and thousands of certificate requests and uploads.

Carrier-Insight

Wrap-Up View

The first-of-its-kind Carrier-Insight offers a wrap-up view for carriers managing the master versus individual policy relationship. For CRS managed wrap-ups, carriers can view the data without requiring data entry – and be connected to the carrier system. For other wraps, a hierarchal view of the wrap-up is offered, and a simple one-page entry for enrollment can be connected to the carrier system.

Our carrier solution offers:

- Organization of Data (Hierarchy)
- Aggregated Data (Wrap-up Model, Loss Triangles)
- Document Retention
- Centralized Wrap-up Management System
- Reduced Audit Costs (Online Payroll Entry)

WrapSheet

Wrap-Up Progress

WrapSheet is a client tool providing real-time visibility into the progress of a wrap-up. At-a-glance visual of a project's compliance status: Clients can view the project hierarchy including easy-to-interpret hardhat colors indicating each contractor's compliance status.

Real-time report access

Clients can also generate real-time reports that contain enrollment, payroll, insurance credit, and claims information.

Certificate library

All wrap-up and off-site certificates available for each contract

Document library

Sponsor, wrap-up, and project level documents

GateKeeper App

Real-Time Reference

The GateKeeper App is an easy real-time reference for who is allowed on site. Easy triggers are available to connect contractors with the admin team if they are not allowed on site.

With our automated approach you can:



- Automate tasks
- Reduce risk
- Improve compliance
- Secure your data