



## Automation and efficiency for today's CIP administration

Vertafore Wrap-Up is an advanced, web-based solution for streamlining and automating the management of Owner Controlled Insurance Programs (OCIP) and Contractor Controlled Insurance Programs (CCIP).

### Streamline communication

The online contractor portal organizes subcontractor communications, eliminates paperwork and reduces the need for manual rekeying of data. The system facilitates communication on program status, with capabilities to send real-time reports to project stakeholders. Even carrier enrollment requests can be automated, further reducing manual effort around communications.

### Manage contractor compliance

Vertafore Wrap-Up makes it easy to supervise accountability with comprehensive reporting on contractors' status. The system manages offsite coverage, evaluating contractors' policy details against compliance checklists and actively monitoring and sending reminders for expired policies. Monthly payroll is tracked for every subcontractor on a project, with automatic notices sent to anyone who's missing. The system helps administrators ensure every participant is compliant, which minimizes risk.

### Online accessibility

Vertafore Wrap-Up offers easy, browser-based access across various locations and user groups. There is no software to install, and data is backed up regularly and stored within a secure, SAS 70-compliant infrastructure. The mobile-ready and browser independent contractor portal allows large groups of contractor users convenient access to a user-friendly portal that becomes their home base for their participation in the program.

### Total control of program compliance

Vertafore Wrap-Up allows administrators to capture all subcontractor details, including experience modifiers, multiple contacts, offsite coverage, and payroll reports. Automated checkpoints within the system flag delinquencies and send automated communications, to ensure total compliance and maintain accurate contractor records.

## Features

### Reporting

- Smart Vertafore technology for advanced searching and manipulating real-time data
- Export data to Excel and import outside reports
- Dashboards and graphs
- Ad-hoc reporting and filters

### Contracting management

- Build master contractor profiles
- Record estimated and actual payroll
- Track sub-contractor relationships in a hierarchy
- Track contract enrollment status

### Workflow

- Create and assign workload tasks
- Measure task completion with comprehensive tracking and auditing

### Product/Carrier management

- Manage multiple carriers
- Adhere to carrier/policy-specific business rules
- Define coverage limits for each project or contract
- Bulk-upload and assign worker's comp sub-policies

### Document management

- Create, store, and send letters and certificates
- Send documents via email or fax
- Track and archive correspondence

### Claims tracking

- Upload claims for every contract
- Calculate loss ratio by project

### Contractor portal

- Mobile-ready web-based portal
- Manage contractor communications
- Customize design to incorporate your branding
- Allow contractors to enroll, report payroll, and more online

### Security

- Create user groups with permissions by role
- Restrict user access to necessary components
- Track and archive field level changes and deletions

## Technology

Vertafore Wrap-Up utilizes Microsoft platform technologies as the foundation for all system development providing a standard architecture to facilitate system upgrades and interfaces with other systems. Uses Microsoft ASP.Net MVC framework for optimal web browser support and excellent user experience.

Vertafore is an active member in Microsoft's Insurance Value Chain (IVC) program and works closely with Microsoft to ensure leading system integration, scalability, reliability and security.

For more information, please visit [www.vertafore.com](http://www.vertafore.com)

### About Vertafore Wrap-Up

Vertafore Wrap-Up was created in 2006 as a purpose-built third-party solution for automating the management of Owner Controlled and Contractor Controlled Insurance Programs (OCIPs/CCIPs). By combining insurance expertise with excellence in software development, Vertafore has grown to be the leading third-party solution for wrap-up administration. Dedicated to helping our clients remain efficient, flexible, and at the forefront of technology, Vertafore has expanded our offerings to include data entry services as well as a mobile application. Acquired by Vertafore in May 2019, Vertafore Wrap-Up continues to be powered by a deep commitment to customer success and leadership in the insurance industry. For more information about Vertafore Wrap-up, please visit [www.vertafore.com](http://www.vertafore.com).