

10 Things To Consider Before Automating Your COI Compliance



WHAT TO CHECK	WHY IT MATTERS	WHAT AUTOMATION SHOULD DO
 Is compliance delaying onboarding or pay apps?	Manual COI review slows vendor approval and payment processing.	Approve vendors faster while maintaining strong risk controls.
 Cross-functional workflow	PMs, Operations, Risk, and AP spend time chasing documents and rechecking compliance.	Create one governed workflow with shared visibility across teams.
 Hidden policy language	Most compliance risk exists beyond certificate expiration dates.	Review endorsements, waivers, exclusions, Additional Insured status, and named insured provisions.
 Project alignment	Insurance requirements drift away from project and contract data.	Connect compliance decisions to systems like Procore and contract information.
 COI volume	Growing vendor and renewal volume overwhelms manual reviewers.	Scale compliance without sacrificing accuracy or consistency.
 Manual review costs	Payment delays, rework, and uninsured exposure create hidden costs.	Reduce operational risk—not just manual effort.
 Contract-driven requirements	Generic compliance rules don't reflect project-specific obligations.	Validate every document against actual contractual insurance requirements.
 Beyond expiration dates	Certificates alone don't prove compliance.	Verify endorsements, policy limits, certificate holders, waivers, and coverage details.
 Complete lifecycle	Disconnected tools create manual work and inconsistent records.	Automate collection, review, deficiency notices, renewals, reporting, audit history, and centralized storage.
 Operational enforcement	Compliance only matters if it affects business operations.	Control onboarding, site access, and payment approvals based on verified compliance.

Ready to Modernize Your COI Compliance?

See how Jones automates COI compliance and speeds onboarding.

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