



**nwc alliance**

standing together

## Trades Tracking



Is your subcontractor's insurance part of the problem or the solution?

What's the difference?

# Coverage Questionnaire

## Questionnaire

Please circle any that apply:

1) Please confirm that the commercial general liability policy is an Insurance Services Office (ISO) form CG0001 10/01 or its equivalent

YES / NO

2) Is there a restrictive endorsement included in the policy for subsidence or earth movement

YES / NO

3) Is there an additional restrictive endorsement included in the policy for damage work performed for you by subcontractors (i.e. CG2294, CG2295)

YES / NO

4) Is there a pollution exclusion

YES / NO

5) Is there a new residential exclusion or limitation

YES / NO

Completed By:

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_

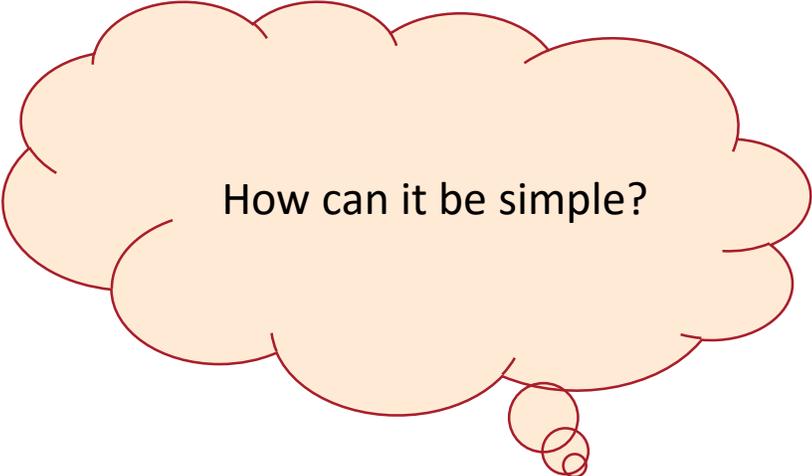
Date: \_\_\_\_\_

Who on your staff understands these questions and can provide analysis to the answers?



# Builder Overview

Batch RFR- Docs	UW Audit	Reviewed?	Client Name	Policy # (+)	State	Date Entered	Date Updated	% Total
		<input checked="" type="checkbox"/>		JEDSMITH1	CA	2015-07-13	2015-07-13	91%
		<input checked="" type="checkbox"/>		JEDSMITH10	CA	2015-07-13	2015-10-08	91%
		<input checked="" type="checkbox"/>		JEDSMITH11	CA	2015-07-13	2015-09-01	91%
		<input checked="" type="checkbox"/>		JEDSMITH12	CA	2015-07-13	2015-08-31	91%
		<input checked="" type="checkbox"/>		JEDSMITH13	CA	2015-07-13	2015-07-13	91%
		<input checked="" type="checkbox"/>		JEDSMITH14	CA	2015-07-13	2015-07-13	91%
		<input checked="" type="checkbox"/>		JEDSMITH15	CA	2015-07-13	2015-07-15	91%
		<input checked="" type="checkbox"/>		JEDSMITH16	CA	2015-07-13	2015-08-11	91%
		<input checked="" type="checkbox"/>		JEDSMITH18	CA	2015-07-14	2015-09-03	91%
		<input checked="" type="checkbox"/>		JEDSMITH2	CA	2015-07-13	2015-07-28	91%
		<input checked="" type="checkbox"/>		JEDSMITH20	CA	2015-08-19		91%
		<input checked="" type="checkbox"/>		JEDSMITH21	CA	2015-08-21		82%
		<input checked="" type="checkbox"/>		JEDSMITH22	CA	2015-09-17	2015-09-30	91%
		<input type="checkbox"/>		JEDSMITH23	CA	2015-09-18		0%
		<input checked="" type="checkbox"/>		JEDSMITH24	CA	2015-09-23	2015-10-08	91%
		<input checked="" type="checkbox"/>		JEDSMITH25	CA	2015-10-09		82%
		<input checked="" type="checkbox"/>		JEDSMITH26	CA	2015-10-14		91%
		<input type="checkbox"/>		JEDSMITH27	CA	2015-10-16		0%
		<input checked="" type="checkbox"/>		JEDSMITH28	CA	2015-11-02	2015-12-03	82%
		<input checked="" type="checkbox"/>		JEDSMITH29	CA	2015-11-11	2015-12-04	18%
		<input checked="" type="checkbox"/>		JEDSMITH3	CA	2015-07-13	2015-12-03	91%
		<input checked="" type="checkbox"/>		JEDSMITH30	CA	2015-11-11		36%
		<input checked="" type="checkbox"/>		JEDSMITH31	CA	2015-11-23	2015-12-02	82%
		<input checked="" type="checkbox"/>		JEDSMITH4	CA	2015-07-13	2015-08-26	91%
		<input checked="" type="checkbox"/>		JEDSMITH5	CA	2015-07-13	2015-07-30	82%
		<input checked="" type="checkbox"/>		JEDSMITH6	CA	2015-07-13	2015-10-08	91%
		<input checked="" type="checkbox"/>		JEDSMITH7	CA	2015-07-13	2015-08-07	91%
		<input checked="" type="checkbox"/>		JEDSMITH8	CA	2015-07-13	2015-07-30	47%
		<input checked="" type="checkbox"/>		JEDSMITH9	CA	2015-07-13	2015-07-13	91%



# Subcontractor Profile

Welcome, [redacted] [Log Out](#)

## CASE System - Trades Tracking

AUDIT for: [redacted]

\* As each question is answered, your data will be automatically saved.

**DONE**

● =Yes, ● =No     

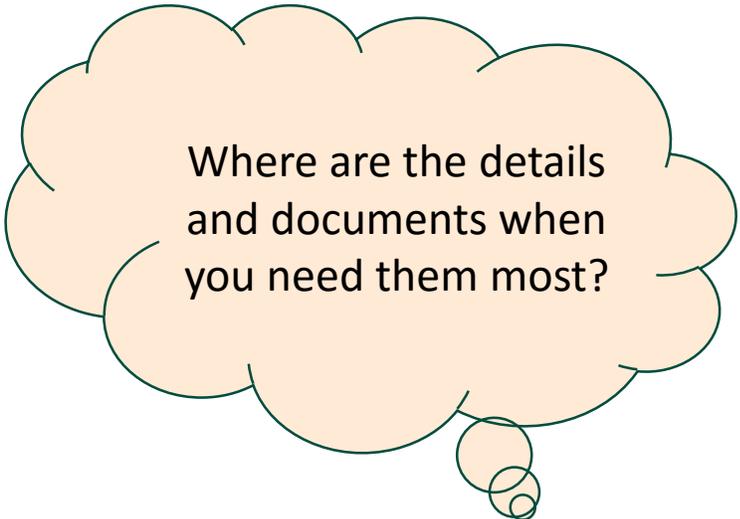
General Information Requests	Relative Importance	Yes/No	Documents?	
<i>If uploading is difficult, please fax documents to 866-531-6456 or e-mail them to <a href="mailto:uploads@case-assist.com">uploads@case-assist.com</a>.</i>				
1. Customer's Requirements on File?		●	●	<input type="button" value="view"/>
Audit Questions and Documentation.				
1. Certificate with properly rate carrier and limits?	☆☆☆☆☆	●	●	<input type="button" value="view"/>
2. "Ongoing Operations" Additional Insured Endorsement?	☆☆☆☆☆	●	●	<input type="button" value="view"/>
3. "Completed Operations" Additional Insured Endorsement?	☆☆☆☆☆	●	●	<input type="button" value="view"/>
4. Waiver of Subrogation?	☆☆☆☆☆	●	●	<input type="button" value="view"/>
5. Per Project Aggregate	☆☆☆☆☆	●	●	<input type="button" value="view"/>
6. Primary/Non Contributory Language?	☆☆☆☆☆	●	●	<input type="button" value="view"/>
7. 30 Day Notice of Cancellation?	☆☆☆☆☆	●	●	<input type="button" value="view"/>
8. Auto Liability Carrier and Limits OK?	☆☆☆☆☆	●	●	<input type="button" value="view"/>
9. Workers Compensation OK?	☆☆☆☆☆	●	●	<input type="button" value="view"/>
10. Affidavit of 1099 Exclusive Customer status?	☆☆☆☆☆	●	●	<input type="button" value="view"/>
11. Current Copy of signed Sub Contract?	☆☆☆☆☆	●	●	<input type="button" value="view"/>

**DONE**



Percentage of available points

A plugin is needed to display this content.



# Bird's Eye Report

White cell = item requirement met

Yellow cell = incomplete item requirement

TT-POLICY	SUBCONTRACTOR COMPANY NAME	Certificate with properly rated carrier and limits?	Ongoing Operations AI endorsement	Completed Operations AI endorsement	Waiver of Subrogation	Per Project Aggregate	Primary/Non-Contributory	30 Day Notice of Cancellation	Auto Liability Carrier and Limits OK?	Workers Compensation OK?	Affidavit of 1099	Questionnaire?
JEDSMITH1		x	x	x	x	x (exception)	x	x	x (limits exception)	x	x (DNA email)	waiting on ends containing exclusions
JEDSMITH2		x - umbrella policy w/ United Specialty Ins Co	x	x	x	x	x	x	x	x	x (DNA email)	x (exception 4,5)
JEDSMITH3		x (Colony Ins Co, have forms list, no dedicated ins program exclsn)	x	x	x	x	x	x	x	x	x (DNA email)	need excpn frm on 2,4,5
JEDSMITH4		x	x	x	x	x	x	x	x	x	x (DNA email)	x (exception 3)
JEDSMITH5		(Hannover policy, need forms list)		wrong policy number on form	wrong policy number on form	wrong policy number on form	on CompOpAI		x	x	x (DNA email)	
JEDSMITH6		x	x	x	x	x	x	x	x	x	x (DNA email)	have a questionnaire...but with the policy mix up maybe have them re-submit one?
JEDSMITH7		x	x	x	x	x	x	x	x	x	x (DNA email)	x (exception #2,4)
exp 11/6/15 JEDSMITH8		x	x	x					x	x		
JEDSMITH9		x	x	x	x "all coverage parts"	x	x	x	x	x	x (DNA email)	x (exception 2-5)
JEDSMITH10		x	x	x	x	x	x	x	x	x	x (DNA email)	x (exception on 2,4,5)
JEDSMITH11		x	x	x	x	x	x	x	x	x	x (DNA email)	x (exception 4,5)
JEDSMITH12											x (DNA email)	x (exception 4,5)
JEDSMITH13											x (DNA email)	x (exception 2,5)
JEDSMITH14					x (exception 2,5)	x (exception)	x	x (exception)	x (exception)	x (exception)	x (exception)	x (exception)
JEDSMITH15		x (Hannover policy, need forms list)									x (DNA email)	x (exception 2,3,6)
JEDSMITH16	x - umbrella policy w/ United Specialty Ins Co, have forms list, no dedicated ins program exclsn									x (DNA email)	x (exception 4,5)	
JEDSMITH17										x (DNA email)	x (exception 2)	

When you need an overview with some detail, what do we send you?

How often?

Can you get a liability insurance discount?



How do I get started?

What are my next steps?

