

Certificate of Insurance Platform for PEOs and Workers' Compensation Master Carriers



The client stands out as an innovative business insurance solution specifically tailored for payroll and HR providers to address this pressing challenge. They actively facilitate collaboration among payroll and HR providers, brokers, small and medium-sized businesses, and carriers, streamlining the insurance policy creation process.

The primary goal is to harness technology to foster connections among individuals, empowering them to make informed, data-driven decisions and simplifying the business insurance process for increased efficiency and transparency.

The Challenges

In recent years, PEOs and Workers' Compensation Master Carriers have been under significant pressure to deliver more for their clients with fewer resources. The fact that PEOs have been issuing COIs with traditional methods has made that a challenge. In this previous method, after an email request is received from the customer, a certificate is created and then emailed back. The process takes time and involves multiple steps, but customers are increasingly asking for on-demand certificates delivered in an instant. PEOs and carriers have been unable to deliver on this request because of technology and integration constraints.

Quarks Solution

We have redefined the process of managing and issuing COIs. The COI platform features a fully automated self-service model for clients to request COIs and generate a standard certificate without PEO involvement. With a user-friendly interface, we enabled clients to work independently and easily access the system, enter the necessary details, and request COIs without the need for manual assistance.

We created a one-stop solution which includes:

- Real-time integration with Payroll and HR systems

This enables instant and automated syncing of client data and policy information, removing the need for manual data entry and related costs. The platform is compatible with systems like PRISM HR and other master policy carriers.

The Benefits

- End-to-end Solutions on a Single Platform

PEOs and their clients have access to multiple capabilities, including: COI creation, downloading, emailing, and generating reports

- Automated Data Ingestion into the Platform on Renewals of Policies

This enables bulk creation and emailing of certificates to clients and their certholders, eliminating the need for individual renewal certificate generation.

- Self Service Capability

This platform enhances the customer experience by allowing PEO customers to generate their certificates with the click of a button through their respective payroll system using single sign-on into the COI platform

Professional Employer Organizations (PEOs) and Workers' Compensation Master Carriers now have a powerful and easy to use platform to help them manage and issue Certificate of Insurance.