



VALPARAISO  
UNIVERSITY

## **Certificate of Insurance (COI) Procedures for Collection and Record Keeping**

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- 1) Determine if a certificate is required based on the type of service you are hiring.
- 2) Check the spreadsheet on the shared drive to see if the University has a certificate on file from this vendor.
  - For academic staff this can be found at i:\team\vendor insurance
  - For non-academic staff the same spreadsheet can be found at g:\team\vendor insurance

If the vendor is listed with a current certificate no further action is required. If the vendor is not listed on the spreadsheet or if the certificate has expired, follow the steps below prior to the time the vendor will be on campus.

- 3) Fax a certificate of insurance request letter to the vendor.
- 4) Upon receipt of the COI, check to see that the university's insurance requirements and limits have been met.
- 5) If yes, use the **COI Routing Form** to forward the certificate to the Office of the VP for Administration & Finance, *Attention: Louise Poracky*
- 6) If no, fax "second" request for certificate of insurance letter to vendor. Upon receipt follow steps 4 and 5 above.
- 7) The certificate and expiration date will be recorded on the shared "Vendor Insurance" spreadsheet. Appropriate departmental staff have inquiry access to the spreadsheet. (To request inquiry access, contact the Purchasing Office)
- 8) COI renewals will be processed by the Office of the VP for Administration and Finance.

If you have questions regarding insurance requirements, please call Louise Poracky in the Office of the VP for Administration & Finance, extension 5215.

