

A connected COI platform that turns vendor certificates into a full picture of third-party risk.



THE CHALLENGE

Vendor compliance programs built on email and spreadsheets leave **coverage gaps** that only surface when a claim hits. Certificates expire, requirements drift from what contracts dictate, and risk teams spend more time **chasing COIs** than enforcing them.

THE SOLUTION

Ebix COI brings certificate requests, AI validation, and full compliance tracking into one operating picture—validating COIs against your actual contract requirements, not generic defaults. From intake through audit—without the heavy lift.

KEY CAPABILITIES

COLLECTION & INTAKE

- Email and vendor portal intake
- Automated vendor/agent outreach
- 40+ document types tracked

→ LESS MANUAL WORK

AI-POWERED VALIDATION

- AI-Powered COI extraction
- AI Task Automation Agent
- AI Contract & Policy Add-Ons

→ FEWER COVERAGE GAPS

COMPLIANCE MONITORING

- Real-time compliance dashboards
- Renewal and expiration alerts
- Defensible audit trail

→ AUDIT-READY YEAR-ROUND

FLEXIBLE SERVICE MODEL

- Self-service or fully managed
- 250+ insurance professionals
- Expert escalation for edge cases

→ SCALES WITH YOUR PROGRAM

KEY VALUE

- Gain full visibility to vendor risk
- Close coverage gaps
- Enforce vendor contracts
- Reduce manual work
- AI-Powered Insights & Automation

HOW IT WORKS

1 Automated COI requests and intake



2 Validated by AI and insurance experts



3 Automated vendor and agent outreach



4 Exceptions resolved by your team or Ebix



5 Compliance monitored in real time

EXPERIENCE

30+

Years
Compliance
Expertise

27+

Industries
Served

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