

Service Provider Documents & Insurance

Project Summary:

This project is to build out the Service Providers Insurance & Documents page where you can store all of your important insurance information and documents for your service providers (Vendors) in one central location, such as, W9s, Certificates of insurance, ACH authorizations and more!

Benefits of Doing This:

- Tracking insurance expiration and automatically notifying the service provider.
- All service providers documents in one location.

Questions to Consider:

- What documents do I want to store for my Service Providers?
- Do I have all the information or will I need to contact any Service Providers?

Approach and Details:

- Assign who will spearhead this project
- Decide if tracking insurance or not
- Decide what documents you want to upload to Vantaca
- Define your document folder structure.
- Gather all necessary documents per service provider and Upload.

Resources:

[Service Provider Documents](#)