

From Inbox Chaos to Instant Compliance

Managing COIs and vendor compliance through email can feel like an endless loop of requests, reminders, and follow-ups. This flowchart shows how Ebix RCS transforms the process from manual chaos to automated clarity.

The Chaos— Manual Process

- Receive COI via email attachment
- Manually save and name file
- Compare COI details to contract requirements
- Spot discrepancies — email vendor for corrections
- Wait for updated COI
- Re-review and approve manually
- Update spreadsheet tracker
- Set manual reminders for renewal dates

The Clarity— Ebix RCS Automation

- Vendor uploads COI directly to secure portal
- OCR instantly reads and validates details
- System auto-matches to your insurance requirements
- Non-compliance triggers instant alerts to vendor
- Compliance status updates in real time
- Automated renewal reminders sent before expiration
- Centralized dashboard shows organization-wide compliance

The Result

With Ebix RCS, your team spends less time chasing documents and more time focusing on strategic risk management — all while reducing exposure and ensuring contractual compliance.