

Reviewing Uploaded Certificate of Insurance

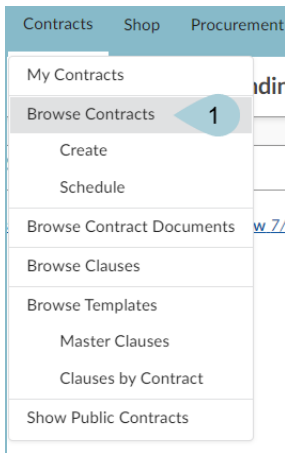
This document is a quick reference guide for users who will review, approve or reject an uploaded COI in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO website: <https://spo.az.gov/>.


Once a supplier uploads a COI to their contract, the contract manager receives a notification. The contract manager can review the COI and decide whether to approve or reject the document.

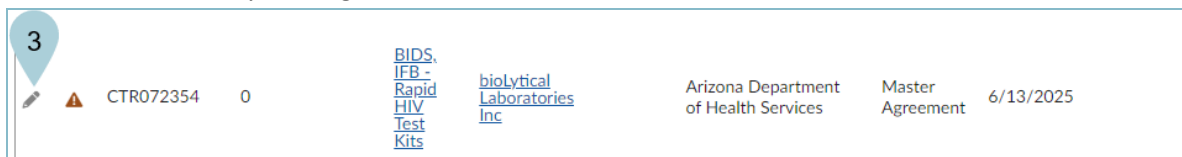
If your agency uses a different process, continue to do so.

Reviewing Certificate of Insurance Via Contract


1. Once logged into APP, navigate to the **Contracts** dropdown and select **Browse Contracts** on the dropdown menu.

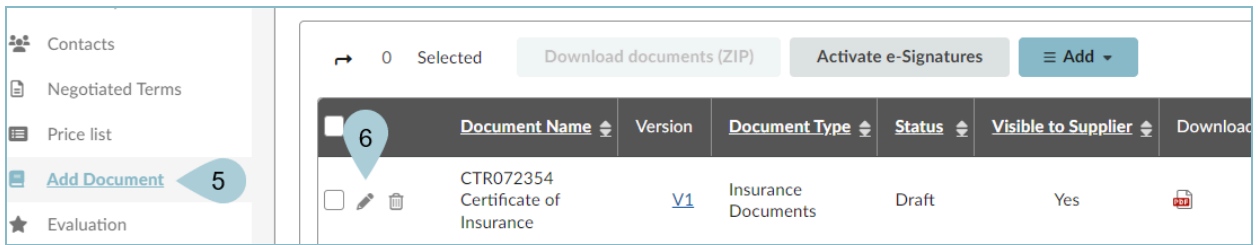


2. Locate the contract you wish to review.
3. Select the contract by clicking the **Pencil**  icon.



4. Place the contract in unilateral amendment status. To perform a Unilateral Amendment, follow the steps in the [Unilateral Amendments](#) QRG.

5. Navigate to the **Add Document** left margin tab.
6. Select the COI document you wish to review by clicking the **Pencil**  icon.



7. If necessary, make updates to the following fields:



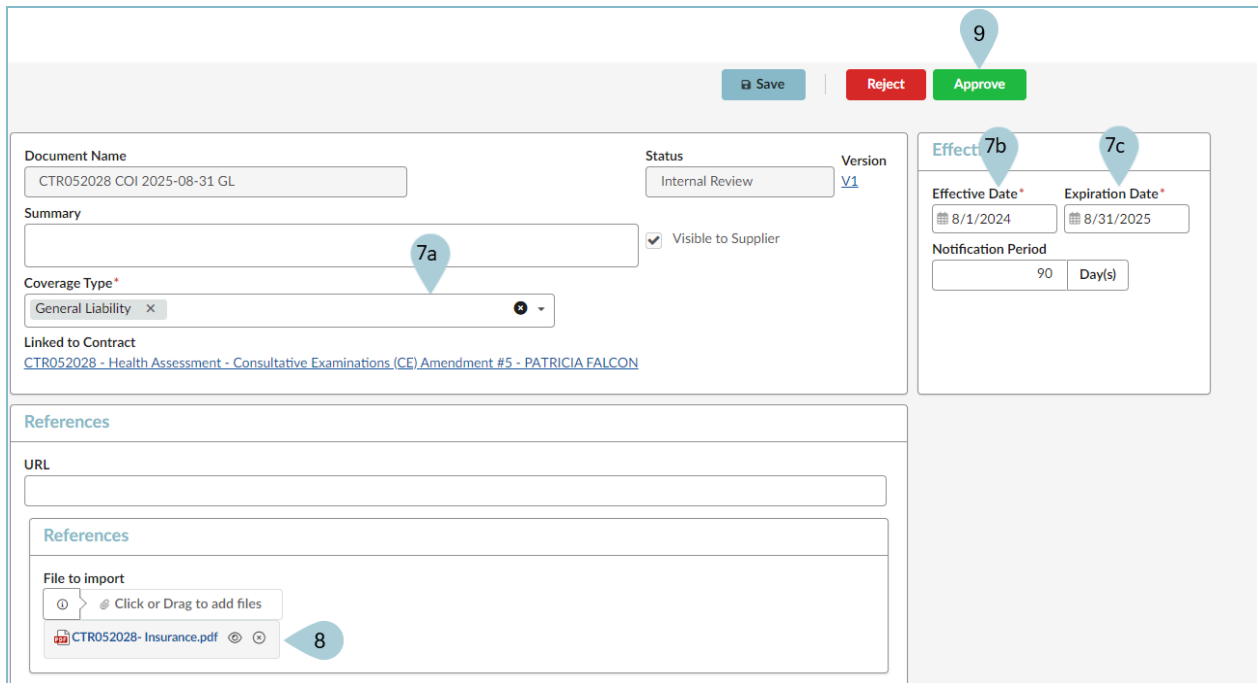
The Document Name field auto populates and does not need editing.

- a. Coverage Type
- b. Effective Date
- c. Expiration Date



When the COI has multiple policies expiring on different dates, verify that the earliest expiration date is used in the Expiration Date field.

8. Click the document to view the COI.
9. If approving the document, click the **Approve** button.



10. The document status changes to Approved.



If rejecting the COI, click the **Reject** button.

Reject

The contract manager must enter a reason before sending it back to the supplier. The supplier can then remove it and upload a new COI.

Reviewing Certificate of Insurance Via Pending Validations

1. Once logged into APP, locate the COI in the My Pending Validations Widget.
2. Select the Pending Validation by clicking the link in the **Object** column.

My pending validations 1 2 See 150+ results

Activity	Task	Object	Organization
SAZ Contract Insurance Document	Approve Document	BIDS, IFB - Rapid HIV Test Kits - CTR072354 Certificate of Insurance	
Purchase Requisition (Active)	Procurement Officer Sourcing	REQ000805637 - TEST (ADHS PREV WIC S Administration/Vendor - Nguyen Brian)	ADHS PREV WIC S Administration/Vendor
Contract Approval	Procurement Manager Approval	CTR059333 - BCDHP - IGA - Senate Bill 1847 - PIMA COUNTY	
Purchase Requisition (Active)	Procurement Officer Sourcing	REQ000804108 - ORRID Quality Connections Sp. Order Epson Ink - Lois Garland (ADHS PREP ORRID S Rapid	ADHS PREP ORRID S Rapid Response Disease Investigation

3. Follow steps 7-10 in the previous section.

Resources

Click the link below for more information on the contract management processes in APP:

<https://spointra.az.gov/arizona-procurement-portal/app-support/quick-reference-guides-176-upgrade/source-contract-qrgs-176>