FOR CONTRACTORS WHO MANAGE SUBS

How to know which subcontractor certificates expire this month

A tracker that runs in your browser. List each policy once and see what comes due inside your window.

> List every sub and vendor certificate with its expiry date, then pick a warning window in days. Anything inside the window gets a request note. The tracker only records the dates you type and says nothing about whether a certificate is valid or enough.

Use one row per policy on each certificate (general liability, auto, workers comp, umbrella). Each policy has its own expiry date. Also check the certificate holder name and any additional insured wording your contract asks for.

PRINT VERSION

Paper tracker

SUB OR VENDOR	POLICY	EXPIRY DATE	REQUESTED ON	RECEIVED ON

SAMPLE ROW, EXAMPLE DATA ONLY

Sub: Example Framing Co. Policy: general liability. Expiry: March 31. Requested on: March 3.

REQUEST NOTE

Template for a sub

Hi _____, our file shows your _____ ends on _____.
Could you send the updated one before then?

EXAMPLE WORDING ONLY

This tracker is a note taking aid. It is not legal or insurance advice. Requirements vary by state and by contract, so check each certificate against your contract and your insurer. Keep vendor

tax forms out of this page.

WHAT THIS SHEET LEAVES FOR YOU

Chasing each sub when a date comes due is still manual.

PR MODE sets up COI and vendor paperwork reminders. A person approves each request before it goes. Read the construction workflows.

PR MODE guide. prmode.ai/guide-coi-expiry-tracker