



COI Tracking Solution Evaluation Checklist for Universities & Colleges:

A Comprehensive Guide for Higher Education Risk Management

When evaluating a prospective automated, COI tracking solution provider, look for the following features.



Core Campus Management Capabilities

- Automated validation of vendor and contractor certificates
- Campus-wide compliance monitoring and alerts
- Department-specific compliance rules engine
- Multi-department access controls and permissions
- Bulk processing for high-volume enrollment periods
- Document version control for academic year cycles
- Custom fields for institution-specific requirements

Administrative Automation

- Automated renewal reminders aligned with academic calendars
- Customizable workflows for different campus stakeholders
- Smart document recognition for varied certificate formats
- Automated compliance verification for campus events
- Inter-departmental communication automation
- Task scheduling for academic year planning

Academic Reporting & Analytics

- Institution-wide compliance dashboards
- Department-level status reporting
- Event and program risk assessment analytics
- Audit documentation for accreditation requirements
- Export capabilities for administrative review (PDF, Excel, CSV)
- Scheduled reports for board and committee meetings

Campus Integration & Security

- Integration with existing campus management systems
- Single Sign-On (SSO) compatibility with university credentials
- Mobile accessibility for on-site verification
- FERPA-compliant data security standards
- Department-based access control
- Disaster recovery aligned with institutional requirements

Vendor & Contractor Management

- Self-service portal for campus vendors
- Streamlined verification for recurring campus events
- Research grant contractor documentation management
- Facilities and construction project tracking
- Student organization vendor requirements
- Athletic event vendor compliance monitoring

Implementation & Academic Support

- Data migration from existing university systems
- Staff training programs and materials
- Technical support during peak academic periods
- Dedicated higher education account management
- Regular updates aligned with institutional needs
- Service Level Agreement (SLA) with education-specific terms

Educational Institution Pricing

- Transparent pricing for institutional budgets
- Scalable licensing for multiple departments
- Implementation and training costs
- Department-specific package options
- Support package pricing for academic schedules
- Flexible contracts for fiscal year planning

Campus ROI Evaluation

- Administrative time savings metrics
- Compliance error reduction statistics
- Risk management improvement tracking
- Staff efficiency optimization
- Institutional risk mitigation assessment
- Cross-department utilization analytics

Solution Score Card

Rate each category from 1-5 (5 being the best):

___ Campus Management
Capabilities

___ Administrative Automation

___ Implementation Support

___ Academic Reporting

___ Campus Integration

___ Educational Pricing

___ Vendor Management

___ Institutional ROI

Total Score: ___ / 40



Next Steps for Institution Implementation

1. Schedule solution demonstration for key stakeholders
2. Contact peer institutions for references
3. Review security and FERPA compliance documentation
4. Assess the implementation timeline for the academic calendar
5. Calculate the total cost of ownership for budget planning