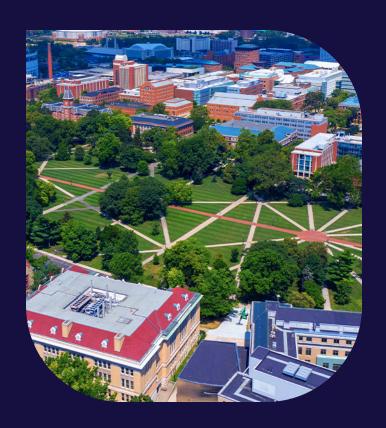


COI Tracking Solution Evaluation Checklist for Universities & Colleges:

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

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

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 educationspecific terms

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

Rate each category from 1-5 (5 being the best):	
Campus Management Capabilities	Administrative Automation	Implementation Support
	Campus Integration	Educational Pricing
Academic Reporting	Vendor Management	Institutional ROI



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