

Cloning a certificate will create an **exact copy of a certificate you previously issued**. This method will copy everything from the Named Insured to the policies, holder, and endorsements.

## What is the benefit in using the Clone method to issue a certificate?

If you have an Insured that repeatedly submits identical certificates requests, with perhaps only one small difference between requests, (for instance, the project number in the Description of Operations, or the Holder Name), certificate cloning might be the best processing method for you.

Because a cloned certificate is an exact replica of a historically issued certificate that was previously approved by all parties (Holder, Insured, Etc.), you'll know the cloned certificate will already meet the requirements by the same parties.

Certificate cloning lets you issue a certificate with the **utmost efficiency**, saving you **valuable time** because you were able to **make use of work you did before**.

This guide will review selecting the most common ACORD form, the ACORD 25.

## How to Clone a Certificate

To begin, drop down "Certificates" and click "Manager".



Within your certificate manage, find a certificate you want to clone.

You can utilize the "Filters" option to conveniently search through your certificates. Once you found the certificate you want to clone, click the "Actions" menu on the far right.

Certificates: Manager								
Manager Import Export Revisions Renewals								
Q Search	差 FILTER (2) ∨	TOGGLE COLUMNS ~ IE ~ + CREATE CERTIFICATE						
STATUS ISSUED CERT # NAMED INS	SURED HOLDER DEACTIVATED DESCRIPTION OF OPERATIONS	SUMMARY ASSIGNED TO ACC ACTIONS						
ACTIVE Jan 26, 2024 2988 Builders,	Inc. Sample Holder - Project #: 15-0005 Certificate	AUTO, BR, GL, UM						

Within the Actions menu, click "Clone".



Certificate Hero will clone the selected certificate and notify you in the upper right corner when the clone is successful.



You will then be brought to the Certificate Editor.

Certificate Editor		ASSIGN DELETE SAVE AS TEMPLATE SAVE REVIEW				
Notes History CID Desc of Ops	ENDORSEMENTS V 2 endorsements attached					
INSURED NOTES	166% ~ 🕞 🕀					
Please send a copy of all certificates to admin@builders.com. Builders. Inc. has two WC policies. Check state of work before selecting one. MA is	ACORD CERTIFICATE OF LIA	BILITY INSURANCE				
Assigned Risk - LOB profile is for contract compliance comparison only. DO NOT issue a COI showing MA WC.	THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLI CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND,	Y AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES				
CERTIFICATE NOTES	BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITU REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.	TE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED				
Add notes related to this certificate	IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the If SUBROGATION IS WAIVED, subject to the terms and conditions of ti this certificate does not confer rights to the certificate holder in lieu of s	policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. he policy, certain policies may require an endorsement. A statement on uch endorsement(s). Select Contact				
	PRODUCER	CONTACT Rebecca's Agency Contact				
6	YOUR AGENCY HERE	PHONE 8138100579 FAX (AIC No. Ext): 6138100579				
	Address Line 1	E-MAIL ADDRESS: rtompkins@certificatehero.com				
SAVE	Address Line 2	INSURER(S) AFFORDING COVERAGE NAIC #				
SAVE	City, State Zip	INSURER A : CNA Insurance Companies 14063				
	INSURED Select Named Insured(s)	INSURER B :				
	Buildore Inc.	INSURER C :				
	95 Rochester Street	INSURER D :				
	Teterboro, NJ 07608 INSURER E :					
		INSURER F :				
	COVERAGES CERTIFICATE NUMBER: 3041	REVISION NUMBER:				
	THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HA INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORC EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE	VE BEEN ISSUED TO THE INSURED NAMED ABOVE TO THE POLICY PERIOD OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS ED BY THE POLICED SESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, BEEN REDUCED BY PAID CLAMS.				
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	A GL9120	09-01-2020 09-01-2021 PERSONAL & ADV INJURY \$ 1,000,000				
	GEN'L AGGREGATE LIMIT APPLIES PER:	GENERAL AGGREGATE \$ 2,000,000				
	POLICY X JECT LOC	PRODUCTS - COMP/OP AGG \$ 2,000,000				
	OTHER:	\$				

The cloning method will make an exact copy of the certificate you selected to clone. This will include everything from the attached endorsements and Named Insured to the policies, any checked AI or WOS boxes, and specific verbiage in the Description of Operations (DOO).

INSU	URED		S	elect Named Insured(s)	INSURER E	B :				_
					INSURER (	C ;				_
95 BUI	liders, Inc. Bochester Street				INSURER D	D :				
Tete	erboro, NJ 07608				INSURER E	E:				
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	See next page									
DES	CRIPTION OF OPERATIONS / LOCATIONS / VEHICL	ES (A	CORE	0 101, Additional Remarks Schedul	le, may be at	ttached if more	e space is requir	ed) Edit Descript	ion of Op	erat

## At this stage, all you need to do is review the certificate and make any changes that are required for this certificate.

After making the necessary changes to this cloned certificate, if you are ready to complete and issue the certificate, proceed to the <u>Certificate Review</u>.

For the purpose of this walkthrough, let's imagine the only difference for the new certificate was a new project number, and all else stayed the same.

Enter the DOO to make the revision.



Within the DOO editor, you will see the project number from the original certificate you cloned. Update to the new project number.

DESCRIPTION OF OPERATIONS	+ LANGUAGE LIBRARY
Project #: 15-0005	
Certificate Holder is included as additional insured basis, as respects the general liability, including on required by written contract. Waiver of subrogatior insured as respects the general liability, if required	on a primary and non-contributory going and completed operations, if applies in favor of the additional by written contract.
	CANCEL UPDATE CERTIFICATE

After updating to the new project number, click "Update Certificate".



The DOO will be updated with the new project number.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Project #: 15-0025	Edit Description of Operations
Certificate Holder is included as additional insured, on a primary and non-contributory basis, as respects the general liab operations, if required by written contract. Waiver of subrogation applies in favor of the additional insured as respects the contract.	lity, including ongoing and completed general liability, if required by written

## **Certificate Review**

Once you have made all necessary changes per the new certificate request, click "Review" to preview and review the certificate prior to issuance.

ASSIGN	DELETE	SAVE AS TEMPLATE	

This will bring you to the Certificate Review where you can preview the certificate and attached endorsements prior to issuing your certificate prior to issuance.

ACORD	CE	RTIF	FICATE OF LIA		SURANG	E	DATE (MM001111)	1	AG	NCY CUSTOMER ID:	
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BELOW. THIS CERTIFICATE	OF INSUR	RANCE	E DOES NOT CONSTITU	TE A CONTRAC	BETWEEN	THE ISSUING INSURE	R(S), AUTHORIZED	AGENCY		NAMED INSURED	
IMPORTANT: If the certificate	bolder is		DITIONAL INSURED the	policy(les) must l		NAL INSURED provisio	ons or he endorsed	YOUR AGENCY HERE		Named Insured	
If SUBROGATION IS WAIVED, this certificate does not confer	subject to rights to t	the te	tificate holder in lieu of a	he policy, certain such endorsement	policies may (s).	require an endorseme	nt. A statement on	POLICY NUMBER			
PRODUCER				CONTACT Agenc	y Contact			CARRIER	NAIC CODE	7	
YOUR AGENCY HERE				PHONE (555	) 555-5555	FAX (AC. No	(555) 555-4444	1		EFFECTIVE DATE:	
Address Line 1				E-MAIL agence	ycontact@ager	ncyemaildomain.com		ADDITIONAL REMARKS			
Address Line 2 City, State Zio					NSURER(S) AFFO	RDING COVERAGE	NAIC #	THIS ADDITIONAL REMAR	KS FORM IS A SCHEDULE TO ACORD FORM		
City, Guild 2.0				INSURER A: CNA	Insurance Corr	panies	36137	FORM NUMBER	FORM TITLE:		
INSURED				INSURER B :							
Named Insured				INSURER C :				Waiver of Subrogation appl	lies in favor of the Additional Insured as respects	he General Liability, if required by written contra	act.
123 Main Street				INSURER D :				1 11			
Anywhere, CA 90210				INSURER E :				4    1			
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Additional Named Insureds: Builde	rs. Inc.				And a set						
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					1988-2015 AC	CORD CORPORATION	. All rights reserved	·    L			
ACORD 25 (2016/03)		The A	CORD name and logo a	are registered ma	rks of ACORI	)		ACORD 101 (2008/01)	The ACORD name and logo	© 2008 ACORD COR re registered marks of ACORD	PORATION. All rights reserved.

Within the distribution section to the right, you can input any distribution required for the certificate.

Certificate Review		BACK CANCEL
Certificate Notes History		Email Fax
		70 CC
CERTIFICATE O		BCC A
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this certificate does not confer rights to the certificate holder in PROUVER YOUR AGENCY HERE Address Line 1 Address Line 2	Teu el such endersement(s). Constantes Proteccia Nagency Contact Constantes Con	BODY + LANGUAGE LIBRARY
City, Davie Zip examps Builders, Inc.	Perversa , CNA Insurance Companies 14003 Perversa , CNA Insurance Companies 14003 Perversa :	Email body text
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	09-01-2020 09-01-2021 AGDREGATE \$ 5,000,000	COMPLETE & DOWNLOAD COMPLETE & EMAIL

When you are ready to issue the certificate, select one of the issuance options in the lower right.

Back in the Certificate Manager, you will see your issued certificate with the new revisions included.

Certificates: Manager									
Manager Import	Manager Import Export Revisions Renewals								
Q Search 50 certificate	25	荖 FILTER ~		TOGGLE COLUMNS $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	+ CREATE CERTIFICATE				
STATUS	ISSUED CERT #	NAMED INSURED HOLDER	DEACTIVATED DESCRIPTION OF OPERATIONS	SUMMARY ASSIGNED TO	A ACTIONS				
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