



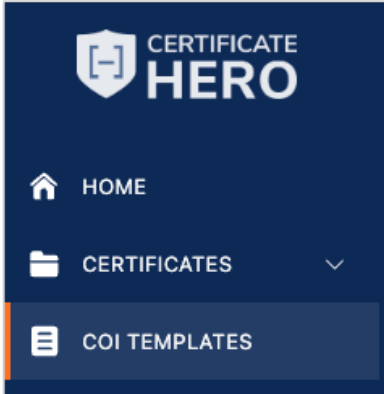
How to Create a Certificate Template

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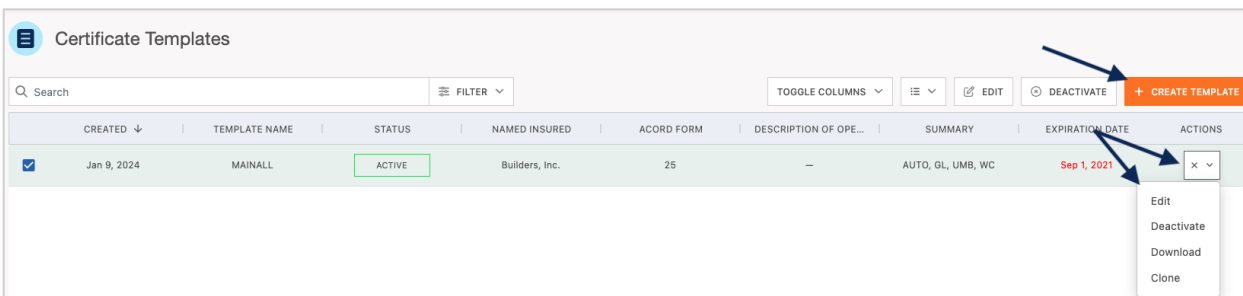
Starting the Certificate Template

To begin creating the certificate template, on the left menu, click “COI Templates”.

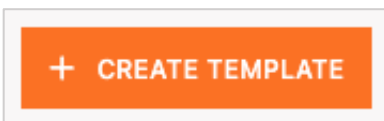


Any existing templates already created will display within your Certificate Templates manager.

From here you can create a new template, or edit, deactivate, download, or clone existing templates.



To create a new certificate template, click “Create Template”.



You will be prompted to enter the name for your template and select the ACORD form type used for the certificates issued from this template.

After filling out the required fields, click “Create” Template”.



This will take you to the Template Editor.

The Notes tab on the left will house any notes on file for the selected insured, including General information regarding the Insured(s) and COI processing instructions.

The ACORD form will populate on the right. Anywhere on the ACORD for that has a grey selector indicates an area that can be updated for the template.

You can add or modify your certificate template by choosing any of the following grey selectors on the ACORD form:

- Agency contact name, number, and email
- Named Insured
- Certificate policies
- Description of Operations
- Certificate Holder
- Signature

		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 12/28/2023		
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</p>						
PRODUCER YOUR AGENCY HERE Address Line 1 Address Line 2 City, State Zip		CONTACT NAME: Kristin Collins PHONE (A/C, No, Ext): 1-800-HERO E-MAIL ADDRESS: kcollins@certificatehero.com FAX (A/C, No):		Select Contact		
INSURED Builders, Inc. 95 Rochester Street Teterboro, NJ 07608		Select Named Insured(s)		INSURER(S) AFFORDING COVERAGE INSURER A : INSURER B : INSURER C : INSURER D : INSURER E : INSURER F :		
COVERAGES		CERTIFICATE NUMBER: 4546350		REVISION NUMBER:		
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>						
INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GENL AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		Add Policy			EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPIOP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY		Add Policy			COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$		Add Policy			EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	<input type="checkbox"/> Y <input type="checkbox"/> N N/A	Add Policy			<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)					Edit Description of Operations	
CERTIFICATE HOLDER		CANCELLATION				
Select/Add Holder		SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.				
		AUTHORIZED REPRESENTATIVE <div style="display: flex; justify-content: space-between;"> Sign Here  </div>				
© 1988-2015 ACORD CORPORATION. All rights reserved.						
ACORD 25 (2016/03)		The ACORD name and logo are registered marks of ACORD				

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Adding the Agency Contact to the Template

Within the contact section of the ACORD form, click “Select Contact”.

uch endorsement(s).		Select Contact
CONTACT NAME:	Kristin Collins	
PHONE (A/C, No, Ext):	1-800-HERO	FAX (A/C, No):
E-MAIL ADDRESS:	kcollins@certificatehero.com	

You will now be able to update the contact within the Template Editor.

Certificate Editor

Notes History CID **Contact**

CONTACT EDIT EXISTING + ADD NEW

Kristin Collins X

CANCEL UPDATE CERTIFICATE

Selecting an Existing Agency Contact

To select an existing contact, click the contact’s name.

Certificate Editor

Notes History CID **Contact**

CONTACT EDIT EXISTING + ADD NEW

Kristin Collins X

CANCEL UPDATE CERTIFICATE

You can scroll through the list of the existing contacts...

Certificate Editor

Notes History CID **Contact**

CONTACT EDIT EXISTING + ADD NEW

Choose a contact...

- Rebecca's Agency Contact (Default)
- Agency Contact
- Kristin Collins

...Or type ahead to find the name of the contact you would like to select.

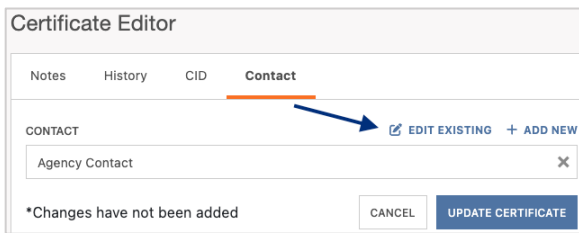
CONTACT EDIT EXISTING + ADD NEW

agenCY CONTACT

AGENCY CONTACT

Edit an Existing Agency Contact

To edit an existing contact, select the desired contact name and click “Edit Existing”.



Certificate Editor

Notes History CID **Contact**

CONTACT EDIT EXISTING + ADD NEW

Agency Contact

*Changes have not been added

Within the edit form, proceed with the revisions and click “Save”.



Edit Agency Contact

NAME

AGENCY CONTACT

SHOW NAME ON CERT

PHONE

AGENCY PHONE

FAX

Enter fax

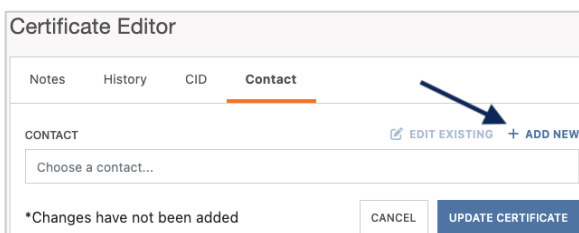
E-MAIL

AGENCY EMAIL

DEFAULT CONTACT

Adding a New Agency Contact

To add a new contact, click “Add New”.



Certificate Editor

Notes History CID **Contact**

CONTACT EDIT EXISTING + ADD NEW

Choose a contact...

*Changes have not been added

Within the create form, fill out the applicable fields and click “Save”.

Create Agency Contact ✕

NAME
Agency Contact

SHOW NAME ON CERT

PHONE
(555) 555-5555

FAX
(555) 555-4444

E-MAIL
agencycontact@agencyemaildomain.com

DEFAULT CONTACT

Once you have selected, revised, or added an Agency Contact, click “Update Certificate” to reflect the change on the ACORD form.

Certificate Editor

Notes History CID **Contact**

CONTACT EDIT EXISTING + ADD NEW

Agency Contact ✕

*Changes have not been added

The Agency Contact on the ACORD form has been updated:

ich endorsement(s).		Select Contact
CONTACT NAME:	Agency Contact	
PHONE (A/C, No, Ext):	(555) 555-5555	FAX (A/C, No): (555) 555-4444
E-MAIL ADDRESS:	agencycontact@agencyemaildomain.com	

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Adding the Named Insured to the Template

Within the Insured section of the ACORD form, click “Select Named Insured(s)”.

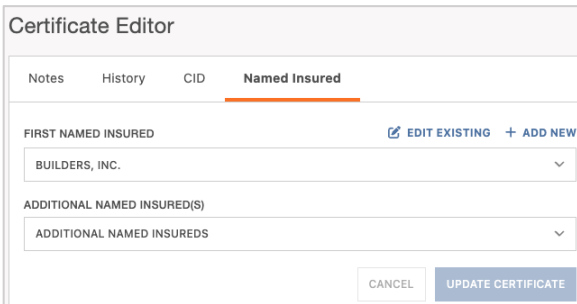


INSURED

Builders, Inc.
95 Rochester Street
Teterboro, NJ 07608

Select Named Insured(s)

You will now be able to update the Named Insured within the Template Editor.



Certificate Editor

Notes History CID **Named Insured**

FIRST NAMED INSURED [EDIT EXISTING](#) [+ ADD NEW](#)

BUILDERS, INC.

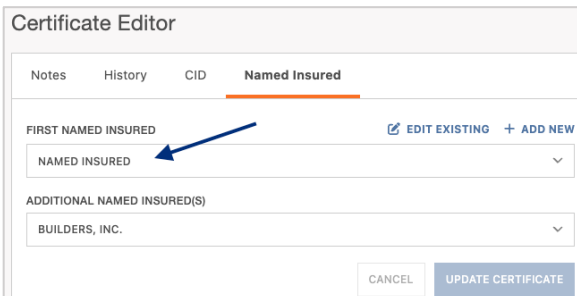
ADDITIONAL NAMED INSURED(S)

ADDITIONAL NAMED INSUREDS

CANCEL UPDATE CERTIFICATE

Selecting an Existing Named Insured

To select an existing Named Insured, click the First Named Insured.



Certificate Editor

Notes History CID **Named Insured**

FIRST NAMED INSURED [EDIT EXISTING](#) [+ ADD NEW](#)

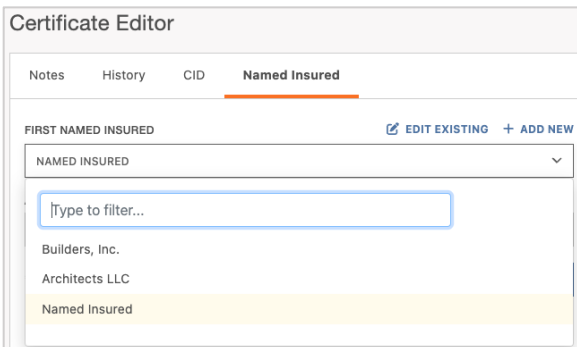
NAMED INSURED

ADDITIONAL NAMED INSURED(S)

BUILDERS, INC.

CANCEL UPDATE CERTIFICATE

You can scroll through the list of the existing Named Insureds...



Certificate Editor

Notes History CID **Named Insured**

FIRST NAMED INSURED [EDIT EXISTING](#) [+ ADD NEW](#)

NAMED INSURED

[Type to filter...]

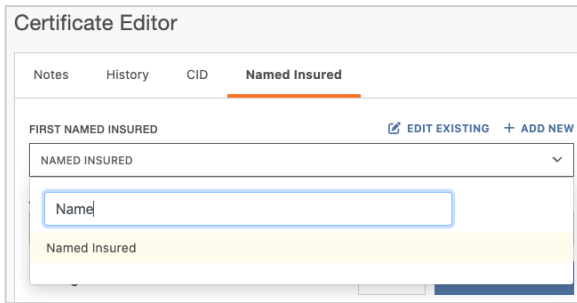
Builders, Inc.

Architects LLC

Named Insured

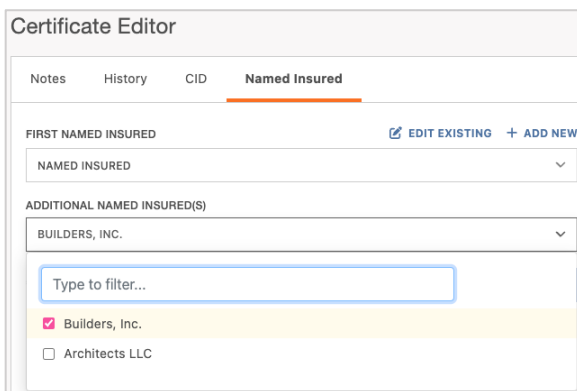
CANCEL UPDATE CERTIFICATE

...Or type ahead to find the Named Insured you would like to select.



The screenshot shows the 'Certificate Editor' interface with the 'Named Insured' tab selected. Under the 'FIRST NAMED INSURED' section, there is a dropdown menu currently showing 'NAMED INSURED'. Below the dropdown is a search input field containing the text 'Name'. A list of search results is visible below the input, with the first item 'Named Insured' highlighted in yellow.

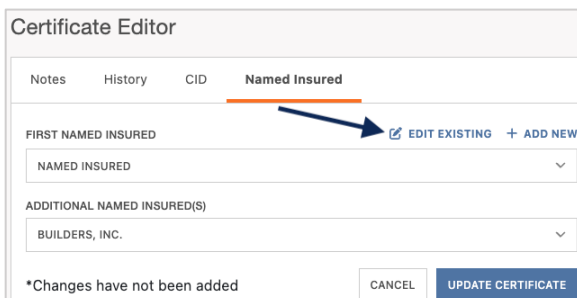
You can also add Additional Named Insured(s) to be reflected on the ACORD form. Click on the “Additional Named Insured(s)” dropdown and selected the additional Named Insured(s) you’d like shown.



The screenshot shows the 'Certificate Editor' interface with the 'Named Insured' tab selected. Under the 'ADDITIONAL NAMED INSURED(S)' section, there is a dropdown menu currently showing 'BUILDERS, INC.'. Below the dropdown is a search input field containing the text 'Type to filter...'. A list of search results is visible below the input, with the first item 'Builders, Inc.' checked and highlighted in yellow, and the second item 'Architects LLC' unchecked.

Edit an Existing Named Insured

To edit an existing Named Insured, select the desired entity and click “Edit Existing”.



The screenshot shows the 'Certificate Editor' interface with the 'Named Insured' tab selected. Under the 'FIRST NAMED INSURED' section, there is a dropdown menu currently showing 'NAMED INSURED'. To the right of the dropdown are two buttons: 'EDIT EXISTING' and '+ ADD NEW'. A blue arrow points to the 'EDIT EXISTING' button. Below the dropdown is a search input field containing the text 'Type to filter...'. A list of search results is visible below the input, with the first item 'Builders, Inc.' checked and highlighted in yellow, and the second item 'Architects LLC' unchecked. At the bottom of the form, there is a status message '*Changes have not been added' and two buttons: 'CANCEL' and 'UPDATE CERTIFICATE'.

Within the edit form, proceed with the revisions and click “Save”.

Edit Named Insured

NAME
Named Insured

INSURED STREET ADDRESS
123 Main Street
Enter primary address cont'd

CITY
Anywhere

STATE
CA

ZIP CODE
90210

SHOW PREVIEW CANCEL SAVE

Please Note: To edit any Additional Named Insureds, follow these same steps.

Adding a New Named Insured

To add a new Named Insured, click “Add New”.

Certificate Editor

Notes History CID **Named Insured**

FIRST NAMED INSURED [EDIT EXISTING](#) [+ ADD NEW](#)

BUILDERS, INC.

ADDITIONAL NAMED INSURED(S)
ADDITIONAL NAMED INSUREDS

CANCEL UPDATE CERTIFICATE

Within the create form, fill out the applicable fields and click “Save”.

Create Named Insured

NAME
Named Insured

INSURED STREET ADDRESS
123 Main Street
Enter primary address cont'd

CITY
Anywhere

STATE
CA

ZIP CODE
90210

SHOW PREVIEW CANCEL SAVE

Once you have selected, revised, or added a Named Insured, click “Update Certificate” to reflect the change to the ACORD form.

Certificate Editor

Notes History CID **Named Insured**

FIRST NAMED INSURED [EDIT EXISTING](#) + ADD NEW

NAMED INSURED

ADDITIONAL NAMED INSURED(S)

BUILDERS, INC.

*Changes have not been added

CANCEL UPDATE CERTIFICATE

The First Named Insured on the ACORD form has been updated:

INSURED **Select Named Insured(s)**

Named Insured
123 Main Street
Anywhere, CA 90210

Any Additional Named Insured(s) will show in the Description of Operation:

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES

Additional Named Insureds: Builders, Inc.

Adding Policies to the Template

Within the Policies section of the ACORD form, click “Add Policy” to begin adding policies to the certificate template.

TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY			Add Policy			EACH OCCURRENCE \$
<input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence) \$
						MED EXP (Any one person) \$
						PERSONAL & ADV INJURY \$
GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE \$
<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						PRODUCTS - COMP/OP AGG \$
OTHER:						\$

This will take you to the Line of Business (LOB) editor. On the far left of this section you can switch through various LOBs to add. You can also select existing LOB profiles or add new LOBs profiles.

POLICY NUMBER	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	DESCRIPTION
<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY				EACH OCCURRENCE LIMIT Value
<input type="checkbox"/> CLAIMS-MADE BASIS	<input type="checkbox"/> OCCURRENCE BASIS			DAMAGE TO RENTED PREMISES LIMIT Value
<input type="checkbox"/> COVERAGE A	Coverage A Name			MEDICAL EXPENSE Value
<input type="checkbox"/> COVERAGE B	Coverage B Name			PERSONAL & ADVERTISING LIMIT Value
<input type="checkbox"/> PER POLICY <input type="checkbox"/> PER PROJECT <input type="checkbox"/> PER LOCATION				GENERAL AGGREGATE LIMIT Value
<input type="checkbox"/> PER OTHER	Other Name			PRODUCTS - COMP/OP AGGREGATE LIMIT Value
				Coverage Name Value

Selecting an Existing Policy LOB

To add an existing LOB, click the “Choose Profile” dropdown and select the policy you would like to add.

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

CHOOSE PROFILE

NO PROFILE

No Profile

2020 GL (Default) - 20-21 General Liability

HIDE EXPIRED

This will populate the data from your Agency Management System (AMS).

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

ADD LOB

CHOOSE PROFILE

2020 GL (DEFAULT) - 20-21 GENERAL L...

EDIT EXISTING + ADD NEW

POLICY NUMBER	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	DESCRIPTION
GL9120	20-21 General Liability	09-01-2020	09-01-2021	

AMS Value: Checked
 COMMERCIAL GENERAL LIABILITY

AMS Value: Unchecked
 CLAIMS-MADE BASIS

AMS Value: Unchecked
 COVERAGE A

AMS Value: Unchecked
 COVERAGE B

AMS Value: Unchecked
 PER POLICY

AMS Value: Unchecked
 PER OTHER

AMS Value: Checked
 OCCURRENCE BASIS

AMS Value: Not Found
Coverage A Name

AMS Value: Not Found
Coverage B Name

AMS Value: Unchecked
 PER PROJECT

AMS Value: Not Found
Other Name

Certificate Only Field
 ADDITIONAL INSURED

Certificate Only Field
 WAIVER OF SUBROGATION

AMS Value: 1,000,000
EACH OCCURRENCE LIMIT

AMS Value: 50,000
DAMAGE TO RENTED PREMISES LIMIT

AMS Value: 5,000
MEDICAL EXPENSE

AMS Value: 1,000,000
PERSONAL & ADVERTISING LIMIT

AMS Value: 2,000,000
GENERAL AGGREGATE LIMIT

AMS Value: 2,000,000
PRODUCTS - COMP/OP AGGREGATE LIMIT

You can either select the next LOB on the left to add to the certificate...

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

CHOOSE PROFILE

NO PROFILE

No Profile

2020 CAU (Default) - 20-21 Auto Liability

HIDE EXPIRED

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

CHOOSE PROFILE

NO PROFILE

No Profile

2020 CUB (Default) - 20 -21 Excess Liability

2020 EXE \$1mil - 20 -21 Excess Liability

HIDE EXPIRED

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

CHOOSE PROFILE

NO PROFILE

No Profile

2020 WC (Default) - 20-21 WC ODS (NH, CT, RI)

HIDE EXPIRED

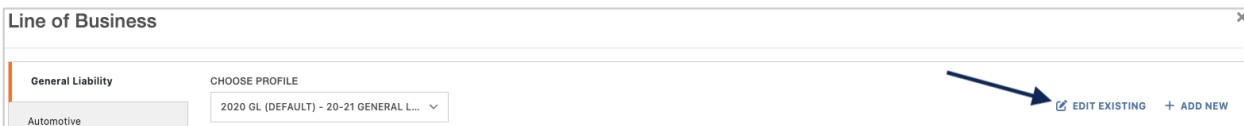
...Or click "Save" in the lower right of the LOB editor to finish adding the selected policy(ies) to the certificate template.



Editing an Existing Policy LOB

Please Note: While you are *unable to increase the limits* pulled from your AMS to show on the certificate, you *can update to show a lower limit*.

To edit an existing LOB, within the LOB editor click "Edit Existing".



This will ensure the values are no longer greyed out and are ready for you to edit. Proceed with the revisions.

Please Note: Any changes you make to the LOB within the Template Manager will *update not just the certificate*, but the LOB across the board.

Line of Business

General Liability | CHOOSE PROFILE: 2020 GL (DEFAULT) - 20-21 GENERAL L...

Automotive | Umbrella | Workers Comp | ADD LOB

POLICY NUMBER	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	DESCRIPTION
GL9120	20-21 General Liability	09-01-2020	09-01-2021	

AMS Value: Checked
 COMMERCIAL GENERAL LIABILITY

AMS Value: Unchecked
 CLAIMS-MADE BASIS

AMS Value: Unchecked
 COVERAGE A

AMS Value: Unchecked
 COVERAGE B

AMS Value: Unchecked
 PER POLICY

AMS Value: Unchecked
 PER OTHER

AMS Value: Checked
 OCCURRENCE BASIS

AMS Value: Not Found
Coverage A Name

AMS Value: Not Found
Coverage B Name

AMS Value: Unchecked
 PER PROJECT

AMS Value: Unchecked
 PER LOCATION

AMS Value: Not Found
Other Name

EACH OCCURRENCE LIMIT: 500,000

DAMAGE TO RENTED PREMISES LIMIT: 50,000

MEDICAL EXPENSE: 5,000

PERSONAL & ADVERTISING LIMIT: 1,000,000

GENERAL AGGREGATE LIMIT: 2,000,000

PRODUCTS - COMP/OP AGGREGATE LIMIT: 2,000,000

*Example: \$1,000,000 AMS value edited to \$500,000

+ ADD OVERFLOW COVERAGE

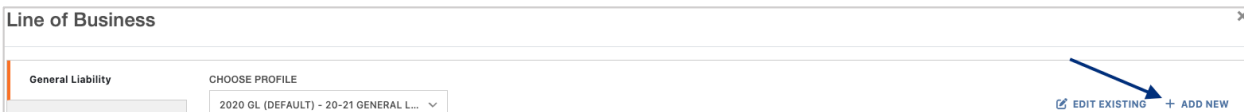
CANCEL | SAVE

After your edits are complete, click “Save” in the lower right of the LOB editor to add the revised policy(ies) to the certificate.



Adding a New Policy LOB

Don't see the policy you want to show on the certificate template? Add a new LOB while issuing a certificate by clicking “Add New”.



This will allow you to create a new LOB Profile right from within the editor, without having to leave your certificate template and entering the policies.

Please Note: While you are *unable to increase the limits* pulled from your AMS to show on the certificate, you *can update to show a lower limit* on this screen.

The ACORD Form type will already be selected determined by the ACORD form you selected at the beginning of the process.

Create General Liability LOB Profile

ACORD FORM	
ACORD 25	▼
POLICY	
	▼
LOB TYPE	
	▼
LOB TYPE NAME	
PROFILE NAME	
<input type="checkbox"/> SET AS DEFAULT	

Select the desired policy from the Policy drop down.

Create General Liability LOB Profile

ACORD FORM
ACORD 25

POLICY
(2020-09-01) GL9120 20-21 General Liability

HIDE EXPIRED

LOB TYPE NAME

After selecting the policy, the LOB Type and LOB Type Name will pre-populate.

Enter a name for the LOB profile you are creating.

Create General Liability LOB Profile

ACORD FORM
ACORD 25

POLICY
(2020-09-01) GL9120 20-21 GEN...

LOB TYPE
GL

LOB TYPE NAME
General Liability

PROFILE NAME
2020 Sample GL

SET AS DEFAULT

AMS Value: Cr
 COMMERCIAL

AMS Value: Ur
 CLAIMS-MANAGED

AMS Value: Ur
 COVERAGE A

AMS Value: Ur
 COVERAGE B

AMS Value: Ur
 PER POLICY

AMS Value: Ur

Review and confirm the data pulled from the AMS.

ACORD FORM: ACORD 25

POLICY: (2020-09-01) GL9120 20-21 GEN...

LOB TYPE: GL

LOB TYPE NAME: General Liability

PROFILE NAME: 2020 Sample GL

SET AS DEFAULT:

AMS Value: Checked COMMERCIAL GENERAL LIABILITY

AMS Value: Unchecked CLAIMS-MADE BASIS

AMS Value: Checked OCCURRENCE BASIS

AMS Value: Unchecked COVERAGE A

AMS Value: Not Found Coverage A Name

AMS Value: Unchecked COVERAGE B

AMS Value: Not Found Coverage B Name

AMS Value: Unchecked PER POLICY

AMS Value: Unchecked PER PROJECT

AMS Value: Unchecked PER LOCATION

AMS Value: Unchecked PER OTHER

AMS Value: Not Found Other Name

EACH OCCURRENCE LIMIT: 1,000,000

DAMAGE TO RENTED PREMISES LIMIT: 50,000

MEDICAL EXPENSE: 5,000

PERSONAL & ADVERTISING LIMIT: 1,000,000

GENERAL AGGREGATE LIMIT: 2,000,000

PRODUCTS - COMP/OP AGGREGATE LIMIT: 2,000,000

Coverage Name: Value:

+ ADD OVERFLOW COVERAGE

SAVE

When ready to select to add the new policy to the ACORD form, click “Save” in the lower right of the LOB editor to update the data on the certificate template.



Additional Insured and/or Waiver of Subrogation Boxes

If you need to check the Additional Insured and/or Waiver of Subrogation boxes, you can do so while within the LOB editor. Select the policy, check the Additional Insured and/or Waiver of Subrogation boxes, and click “Save”.

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

ADD LOB

CHOOSE PROFILE: 2020 GL (DEFAULT) - 20-21 GENERAL L...

EDIT EXISTING + ADD NEW

POLICY NUMBER	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	DESCRIPTION
GL9120	20-21 General Liability	09-01-2020	09-01-2021	

AMS Value: Checked COMMERCIAL GENERAL LIABILITY

AMS Value: Unchecked CLAIMS-MADE BASIS

AMS Value: Checked OCCURRENCE BASIS

AMS Value: Unchecked COVERAGE A

AMS Value: Not Found Coverage A Name

AMS Value: Unchecked COVERAGE B

AMS Value: Not Found Coverage B Name

AMS Value: Unchecked PER POLICY

AMS Value: Unchecked PER PROJECT

AMS Value: Unchecked PER LOCATION

AMS Value: Unchecked PER OTHER

AMS Value: Not Found Other Name

Certificate Only Field ADDITIONAL INSURED

Certificate Only Field WAIVER OF SUBROGATION

EACH OCCURRENCE LIMIT: 1,000,000

DAMAGE TO RENTED PREMISES LIMIT: 50,000

MEDICAL EXPENSE: 5,000

PERSONAL & ADVERTISING LIMIT: 1,000,000

GENERAL AGGREGATE LIMIT: 2,000,000

PRODUCTS - COMP/OP AGGREGATE LIMIT: 2,000,000

Coverage Name: Value:

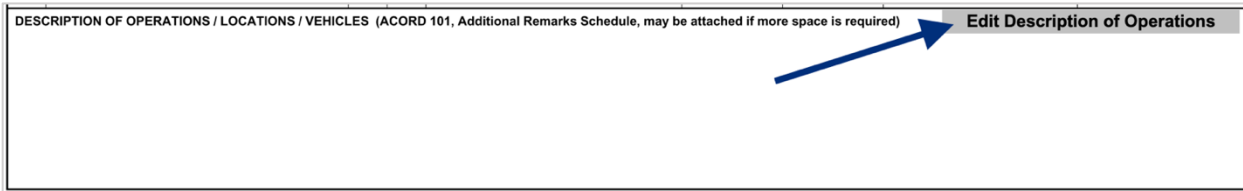
CANCEL SAVE

The selected policies and any applicable revisions or additions are now reflected on the ACORD form:

COVERAGES		CERTIFICATE NUMBER: 2638				REVISION NUMBER:	
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.							
INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	GL9120 Add Policy	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			CAU9120 Add Policy	09-01-2020	09-01-2021	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED: RETENTION \$			EXCESS9120 Add Policy	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			OOSWC9120 Add Policy	09-01-2020	09-01-2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

Adding the Description of Operations to the Template

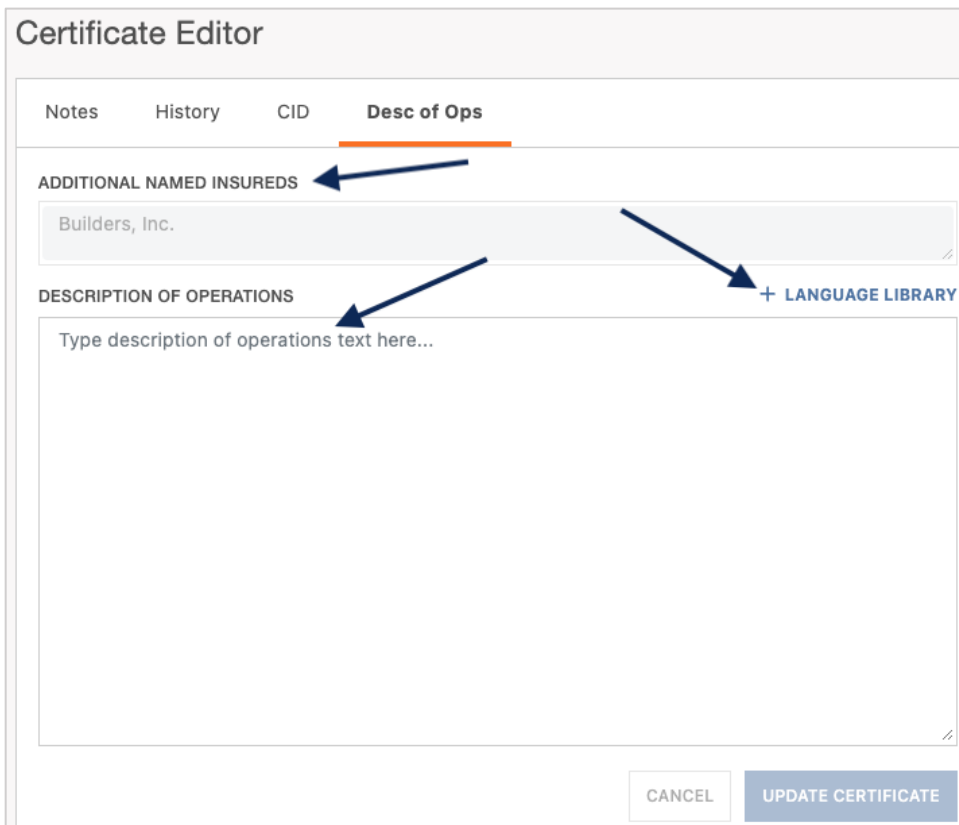
To add verbiage to the Description of Operations (DOO) to show on any certificate issued from the certificate template, click “Edit Description of Operations”.



You will now be able to update the DOO verbiage within the Template Editor.

Please Note: Any previously selected Additional Named Insureds will be reflected in the “Additional Named Insureds” box, indicating this will be present in the DOO as well.

You can either select previously entered verbiage templates from the Language Library, or manually enter the verbiage in the free form DOO box.

A screenshot of the "Certificate Editor" interface. The "Desc of Ops" tab is selected and highlighted with an orange underline. Below the tab are two main sections: "ADDITIONAL NAMED INSURED" and "DESCRIPTION OF OPERATIONS". The "ADDITIONAL NAMED INSURED" section contains a text box with "Builders, Inc." and a blue arrow pointing to it from the left. The "DESCRIPTION OF OPERATIONS" section contains a large text area with the placeholder text "Type description of operations text here...". To the right of this text area is a button labeled "+ LANGUAGE LIBRARY" with a blue arrow pointing to it from the right. At the bottom of the editor are two buttons: "CANCEL" and "UPDATE CERTIFICATE".

Language Library

To view your verbiage templates, click “Language Library”.



You can search for your desired language library template by scrolling through the existing entries, or by utilizing the type ahead feature in the search bar at the top.

Once you found the language you want to add, check the box on the far left.

From here you can either edit that existing template or add to the DOO.

The screenshot shows a dialog titled "Add To Description Of Operations" with a search bar containing "additional", a filter icon, and buttons for "TOGGLE COLUMNS", "+ CREATE NEW", and "EDIT". A table below has columns for NAME, CONTENT, and CREATED. One row is checked, with "Invalid" in the NAME column and "The General Liability and Auto policies include blanket auto..." in the CONTENT column. The CREATED date is "Dec 11, 2023". At the bottom, there is a "10 ROWS" dropdown, a pagination control showing "1" selected, and "CLOSE" and "ADD DESCRIPTION OF OPERATIONS" buttons.

Editing Language Library Template

To add an existing Language Library template, ensure the template you want to edit is checked and click "Edit".

The screenshot shows the same dialog with the search bar containing "AI & WOS". The table has columns for NAME, CONTENT, CREATED, and STATUS. One row is checked, with "General Liability AI & WOS" in the NAME column, "Certificate holder is included as Additional Insured, on a Pri..." in the CONTENT column, "Jan 3, 2024" in the CREATED column, and "ACTIVE" in the STATUS column. An arrow points to the "EDIT" button.

Within the edit form, proceed with the revisions and click "Save".

Edit Language ✕

NAME *

General Liability AI & WOS

CONTENT *

Editing this Template

Certificate holder is included as Additional Insured, on a Primary and Non-contributory basis, as respects the General Liability, including ongoing and completed operations, if required by written contract.

Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.

Create a New Language Library Template

To create a new Language Library template, click “Create New”.

Add To Description Of Operations ✕

Q GL

NAME ↓	CONTENT	CREATED	STATUS
<input type="checkbox"/> GL (AI PnC WOS)	Certificate holder is included as additional insured, on a pri...	Jun 1, 2022	<input type="button" value="ACTIVE"/>

Within the create form, fill out the applicable fields and click “Save”.

Create Language ✕

NAME *

General Liability AI & WOS

CONTENT *

Certificate holder is included as Additional Insured, on a Primary and Non-contributory basis, as respects the General Liability, including ongoing and completed operations, if required by written contract.

Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.

Once you have selected, revised, or added a template, ensure the template is checked and click “Add Description of Operations”.

Add To Description Of Operations

Q GL FILTER TOGGLE COLUMNS + CREATE NEW EDIT

NAME ↓	CONTENT	CREATED	STATUS
<input checked="" type="checkbox"/> GL (AI PnC WOS)	Certificate holder is included as additional insured, on a pri...	Jun 1, 2022	ACTIVE

10 ROWS << < 1 > >>

CLOSE ADD DESCRIPTION OF OPERATIONS

After you’ve finished adding all language from the library, click “Close”.

CLOSE ADD DESCRIPTION OF OPERATIONS

The Description of Operations also allows for free form edits. You can manually type out the DOO verbiage or include additional verbiage to a template added from the Language Library.

Certificate Editor

Notes History CID **Desc of Ops**

ADDITIONAL NAMED INSUREDS

Builders, Inc.

DESCRIPTION OF OPERATIONS [+ LANGUAGE LIBRARY](#)

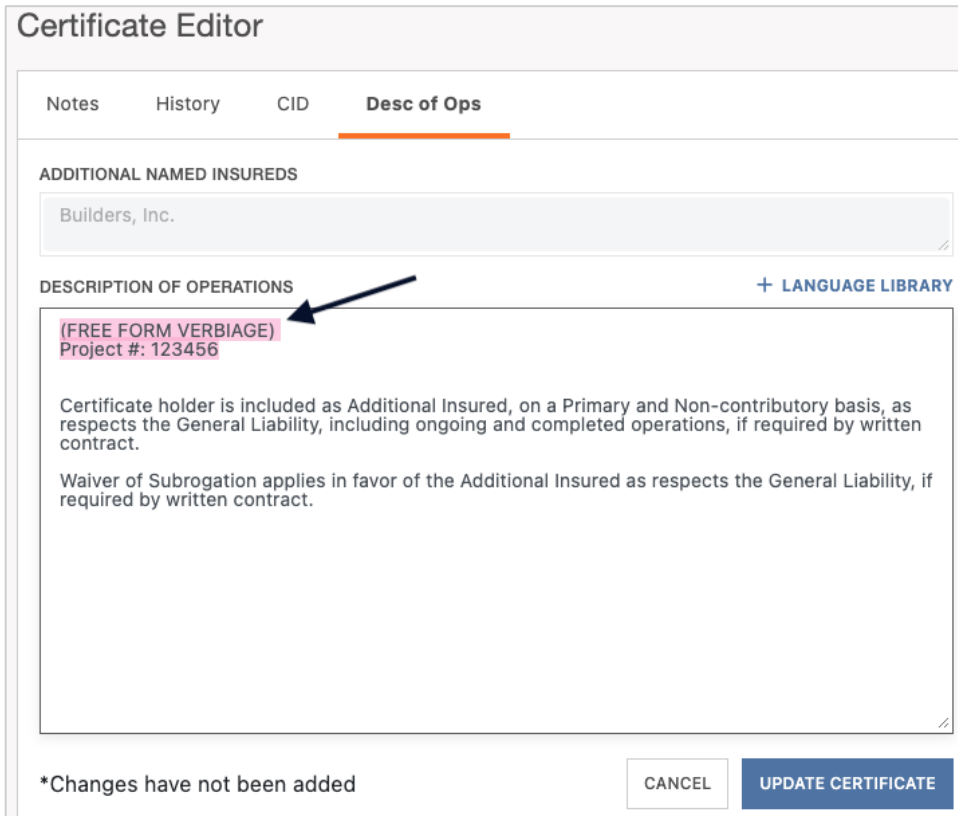
(FREE FORM VERBIAGE)
Project #: 123456

Certificate holder is included as Additional Insured, on a Primary and Non-contributory basis, as respects the General Liability, including ongoing and completed operations, if required by written contract.

Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.

*Changes have not been added

CANCEL UPDATE CERTIFICATE



Once you have reviewed the verbiage to be referenced on the certificate template, click “Update Certificate” to reflect the change to the template.

Certificate Editor

Notes History CID **Desc of Ops**

ADDITIONAL NAMED INSUREDS

Builders, Inc.

DESCRIPTION OF OPERATIONS [+ LANGUAGE LIBRARY](#)

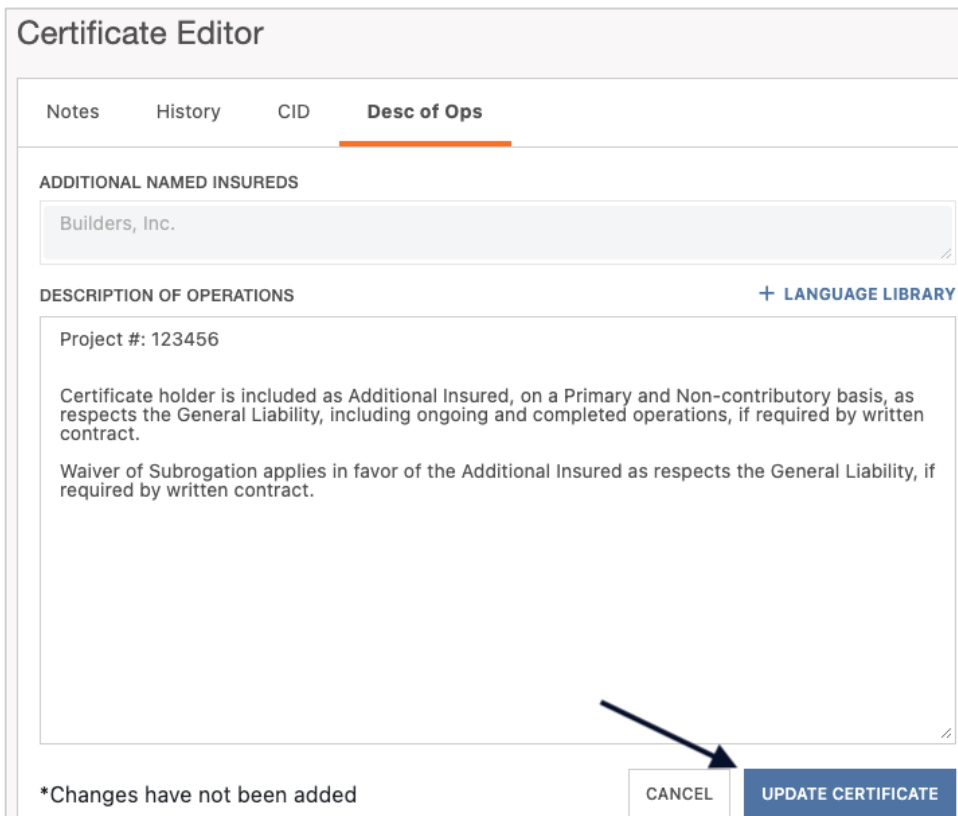
Project #: 123456

Certificate holder is included as Additional Insured, on a Primary and Non-contributory basis, as respects the General Liability, including ongoing and completed operations, if required by written contract.

Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.

*Changes have not been added

CANCEL UPDATE CERTIFICATE



The DOO of the ACORD form has been updated:

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)	Edit Description of Operations
Additional Named Insureds: Builders, Inc. Project #: 123456	
Certificate holder is included as Additional Insured, on a Primary and Non-contributory basis, as respects the General Liability, including ongoing and completed operations, if required by written contract.	

Anything that did not fit on the first page of the ACORD form has overflowed to the additional remarks schedule of the certificate, also known as the Certificate Hero 101:

ADDITIONAL REMARKS	Edit Description of Operations
THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM, FORM NUMBER: _____ FORM TITLE: _____	
Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.	

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Adding the Certificate Holder to the Template

If you are creating a certificate template that is not Certificate Holder specific, you can leave the Certificate Holder section blank, and this section can be added later within the certificate processing flow.

However, if you are **creating a certificate template for a specific Certificate Holder**, you can add the Certificate Holder to the ACORD form as well.

Within the Certificate Holder section of the ACORD form, click “Select/Add Holder”.

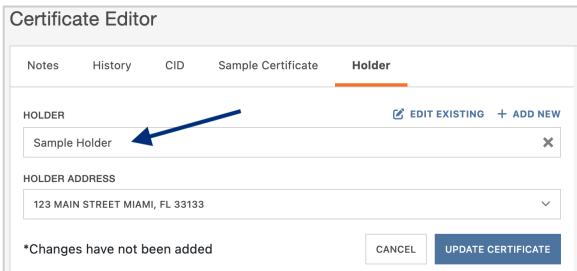
CERTIFICATE HOLDER
<div style="text-align: right;">Select/Add Holder</div>

You can select any Holder that has historically been entered by your agency. You can also add a new Holder.

Certificate Editor			
Notes	History	CID	Holder
HOLDER		EDIT EXISTING	+ ADD NEW
Enter a holder...			
HOLDER ADDRESS		CHOOSE HOLDER ADDRESS	
CANCEL		UPDATE CERTIFICATE	

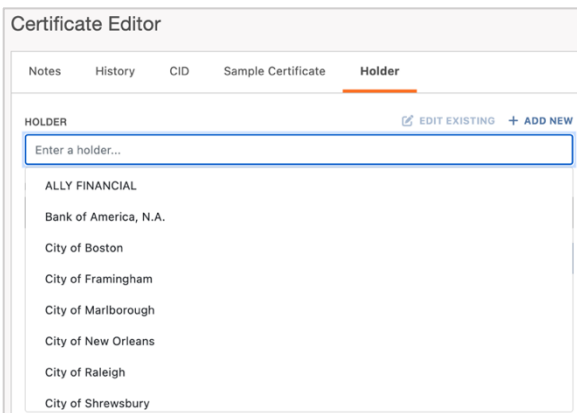
Selecting an Existing Holder

To select an existing Holder, click the Holder name.



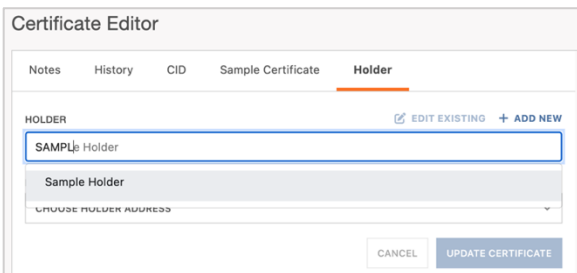
The screenshot shows the 'Certificate Editor' interface with the 'Holder' tab selected. The 'HOLDER' field contains 'Sample Holder' and is highlighted with a blue arrow. Below it, the 'HOLDER ADDRESS' field shows '123 MAIN STREET MIAMI, FL 33133'. At the bottom, there are 'CANCEL' and 'UPDATE CERTIFICATE' buttons, and a status message: '*Changes have not been added'.

You can scroll through the list of the existing Holders...



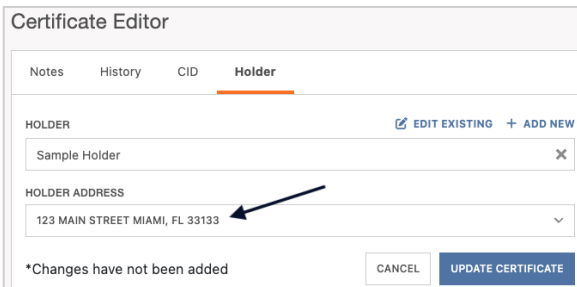
The screenshot shows the 'Certificate Editor' interface with the 'Holder' tab selected. The 'HOLDER' field is empty and contains the placeholder text 'Enter a holder...'. Below the field is a scrollable list of existing holders: ALLY FINANCIAL, Bank of America, N.A., City of Boston, City of Framingham, City of Marlborough, City of New Orleans, City of Raleigh, and City of Shrewsbury.

...Or type ahead to find the Holder you would like to select.



The screenshot shows the 'Certificate Editor' interface with the 'Holder' tab selected. The 'HOLDER' field contains 'SAMPLE Holder' and is highlighted with a blue border. Below the field, a dropdown menu shows 'Sample Holder' as the selected option. The 'HOLDER ADDRESS' field is empty and contains the placeholder text 'CHOOSE HOLDER ADDRESS'. At the bottom, there are 'CANCEL' and 'UPDATE CERTIFICATE' buttons.

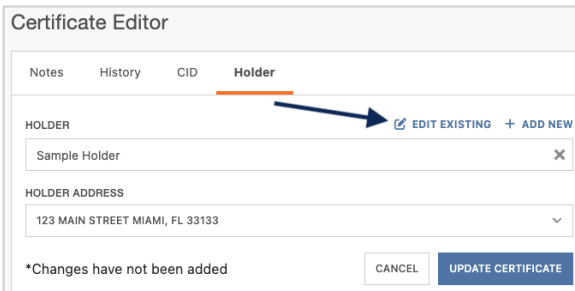
Once you have selected the Holder, you can choose to show the address already on file for that Holder, or to forego showing an address.



The screenshot shows the 'Certificate Editor' interface with the 'Holder' tab selected. The 'HOLDER' field contains 'Sample Holder' and is highlighted with a blue arrow. Below it, the 'HOLDER ADDRESS' field shows '123 MAIN STREET MIAMI, FL 33133' and is highlighted with a blue arrow. At the bottom, there are 'CANCEL' and 'UPDATE CERTIFICATE' buttons, and a status message: '*Changes have not been added'.

Edit an Existing Holder

To edit an existing Holder, select the desired Holder and click “Edit Existing”.



Certificate Editor

Notes History CID **Holder**

HOLDER

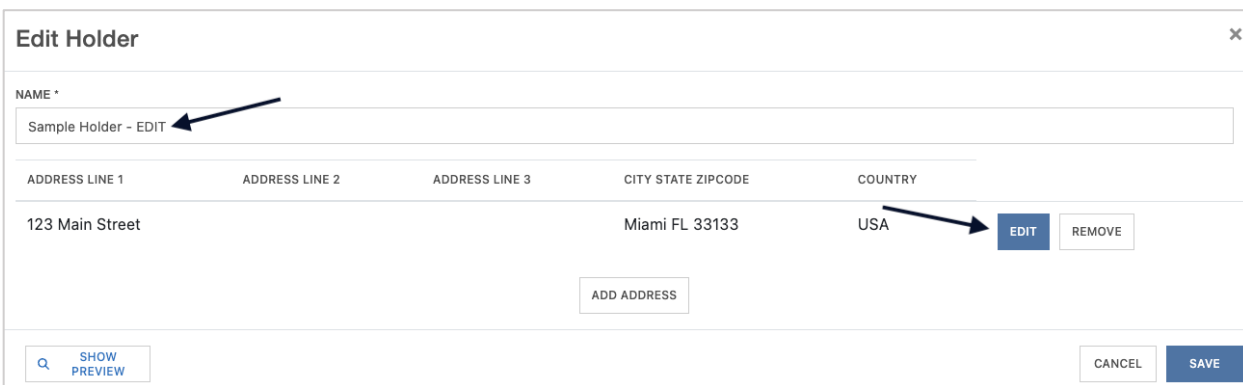
Sample Holder

HOLDER ADDRESS

123 MAIN STREET MIAMI, FL 33133

*Changes have not been added

Within the Holder name edit form, proceed with the revising the name of the Holder. If you need to update the Holder address, click “Edit”.



Edit Holder

NAME *

Sample Holder - EDIT

ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	CITY STATE ZIPCODE	COUNTRY
123 Main Street			Miami FL 33133	USA

Within the Holder address edit form, proceed with the revisions, and click “Update Address”.



Edit Holder Address

NAME *

Sample Holder - EDIT

ADDRESS LINE 1

123 Main Street

ADDRESS LINE 2

Suite 456

ADDRESS LINE 3

CITY

Miami

COUNTRY

USA

STATE

FL

POSTAL CODE

33133

Back on the Edit Holder screen, when all revisions are complete, click “Save”.

Create Holder [X]

NAME *
Sample Holder

ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	CITY STATE ZIPCODE	COUNTRY	
123 Main Street			Miami FL 33133	USA	EDIT REMOVE

[ADD ADDRESS](#)

[SHOW PREVIEW](#) [CANCEL](#) [SAVE](#)

Add a New Holder

To add a new Certificate Holder, click “Add New”.

Certificate Editor

Notes History CID **Holder**

HOLDER [EDIT EXISTING](#) [+ ADD NEW](#)

Enter a holder...

HOLDER ADDRESS
CHOOSE HOLDER ADDRESS

[CANCEL](#) [UPDATE CERTIFICATE](#)

Enter the new Holder name.

To add an address to show on the certificate, click “Add Address”.

Create Holder [X]

NAME *
Sample Holder

ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	CITY STATE ZIPCODE	COUNTRY
----------------	----------------	----------------	--------------------	---------

[ADD ADDRESS](#)

[SHOW PREVIEW](#) [CANCEL](#) [SAVE](#)

Fill out the address form and click “Add Address”.

Edit Holder Address ✕

NAME *
Sample Holder

ADDRESS LINE 1
123 Main Street

ADDRESS LINE 2

ADDRESS LINE 3

CITY
Miami

COUNTRY
USA

STATE
FL

POSTAL CODE
33133

[SHOW PREVIEW](#) [CANCEL](#) [ADD ADDRESS](#)

After reviewing the new Holder information, click “Save”.

Create Holder ✕

NAME *
Sample Holder

ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	CITY STATE ZIPCODE	COUNTRY	
123 Main Stree			Miami FL 33133	USA	EDIT REMOVE
ADD ADDRESS					

[SHOW PREVIEW](#) [CANCEL](#) [SAVE](#)

Once you have selected, revised, or added a Holder, click “Update Certificate” to reflect the change to the ACORD form.

Certificate Editor

Notes History CID **Holder**

HOLDER [EDIT EXISTING](#) [+ ADD NEW](#)
Sample Holder ✕

HOLDER ADDRESS
123 MAIN STREET MIAMI, FL 33133

*Changes have not been added [CANCEL](#) [UPDATE CERTIFICATE](#)

The Holder on the ACORD form has been updated:

CERTIFICATE HOLDER	
Sample Holder 123 Main Street Miami, FL 33133	Select/Add Holder

Adding the Signature to the Certificate Template

Within the Signature section of the ACORD form, click “Sign Here”.



You will now be able to update the Signature within the Template Editor.



Selecting an Existing Signature

To select an existing Signature, click to choose a signature.



You can scroll through the list of the existing signatures...



...Or type ahead to find the signature you would like to select.



Edit an Existing Signature

To edit an existing Signature, select the desired Signature and click “Edit Existing”.



Certificate Editor

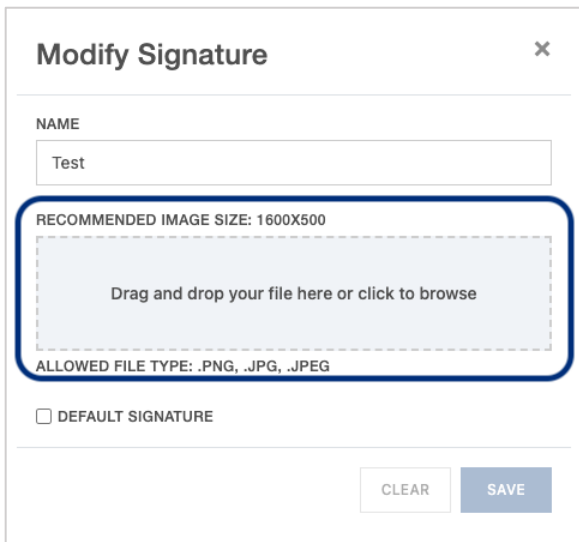
Notes History CID **Signature**

SIGNATURE

Test NV

*Changes have not been added

From here, you will be able to either upload a new signature, and/or edit the signature name.



Modify Signature

NAME

Test

RECOMMENDED IMAGE SIZE: 1600X500

Drag and drop your file here or click to browse

ALLOWED FILE TYPE: .PNG, .JPG, .JPEG

DEFAULT SIGNATURE

Within the edit form, proceed with the revisions and click “Save”.



Modify Signature

NAME

Test

Signature

DEFAULT SIGNATURE

Adding a New Signature

To add a new Signature, click “Add New”.



Certificate Editor

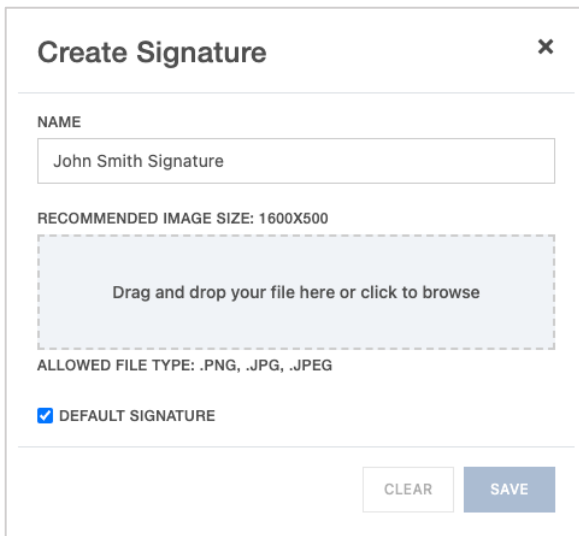
Notes History CID **Signature**

SIGNATURE [EDIT EXISTING](#) **+ ADD NEW**

Choose a signature...

You need to select a signature

Within the create form, fill out the applicable fields and upload the new Signature.



Create Signature

NAME

John Smith Signature

RECOMMENDED IMAGE SIZE: 1600X500

Drag and drop your file here or click to browse

ALLOWED FILE TYPE: .PNG, .JPG, .JPEG

DEFAULT SIGNATURE

Then click “Save”.



Create Signature

NAME

John Smith Signature

Signature

DEFAULT SIGNATURE

Once you have selected, revised, or added a Signature, click “Update Certificate” to reflect the change to the certificate.



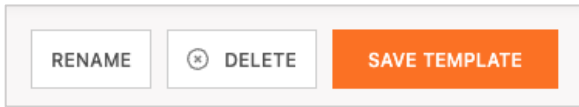
The screenshot shows the 'Certificate Editor' interface. At the top, there are tabs for 'Notes', 'History', 'CID', and 'Signature', with 'Signature' being the active tab. Below the tabs, there is a 'SIGNATURE' section with a text input field containing 'Test NV' and a clear button (X). To the right of the input field are two links: 'EDIT EXISTING' and '+ ADD NEW'. Below the input field, there is a status message: '*Changes have not been added'. At the bottom of the section, there are two buttons: 'CANCEL' and 'UPDATE CERTIFICATE'. A blue arrow points from the 'UPDATE CERTIFICATE' button to the 'UPDATE CERTIFICATE' button.

The signature on the certificate has been updated:



Completing the Certificate Template

Once your template is completed and you are ready to move forward, in the upper right corner click “Save Template”.

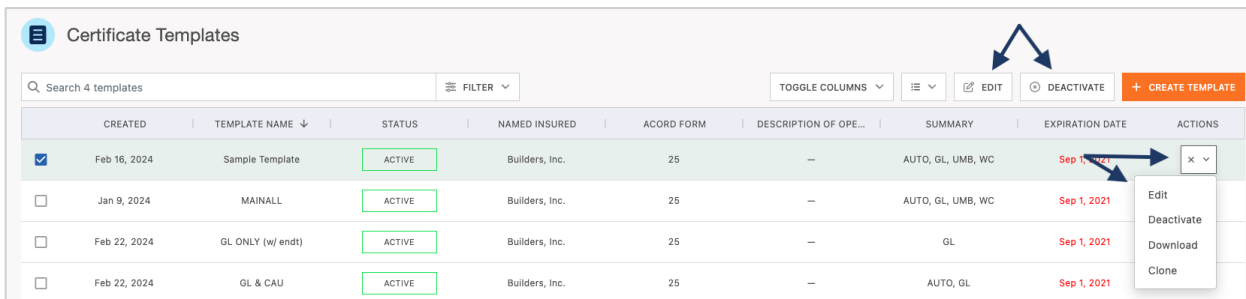


This will take you back to the Certificate Templates manager.

[Back to Top](#)

Certificate Templates Manager Actions

Within your Certificate Templates manager, there are several actions you can take with existing templates.

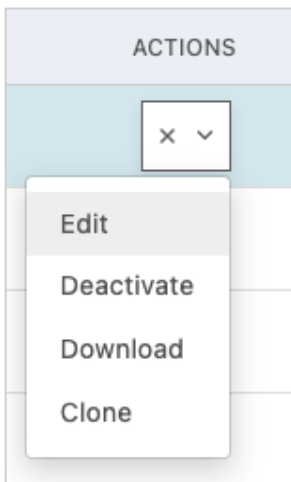


The screenshot shows the 'Certificate Templates' manager interface. At the top, there is a search bar with 'Search 4 templates' and a 'FILTER' dropdown. To the right are buttons for 'TOGGLE COLUMNS', 'EDIT', 'DEACTIVATE', and 'CREATE TEMPLATE'. Below this is a table with columns: CREATED, TEMPLATE NAME, STATUS, NAMED INSURED, ACORD FORM, DESCRIPTION OF OPE..., SUMMARY, EXPIRATION DATE, and ACTIONS. The first row is selected, and its 'ACTIONS' column has a dropdown menu open with options: Edit, Deactivate, Download, and Clone.

CREATED	TEMPLATE NAME	STATUS	NAMED INSURED	ACORD FORM	DESCRIPTION OF OPE...	SUMMARY	EXPIRATION DATE	ACTIONS
Feb 16, 2024	Sample Template	ACTIVE	Builders, Inc.	25	—	AUTO, GL, UMB, WC	Sep 1, 2021	⌵
Jan 9, 2024	MAINALL	ACTIVE	Builders, Inc.	25	—	AUTO, GL, UMB, WC	Sep 1, 2021	
Feb 22, 2024	GL ONLY (w/ endt)	ACTIVE	Builders, Inc.	25	—	GL	Sep 1, 2021	
Feb 22, 2024	GL & CAU	ACTIVE	Builders, Inc.	25	—	AUTO, GL	Sep 1, 2021	

Edit

Allows a user to revise an existing certificate template.



Within the Template Editor, along with making any needed revisions, you can also deactivate the template, or rename the template.

When you have completed your revisions, click “Save Template” to return to the Certificate Templates manager.

Template Editor: Sample Template

Notes

INSURED NOTES

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 Assigned Risk - LOB profile is for contract compliance comparison only. DO NOT issue a COI showing MA WC.

SAVE

ENDORSEMENTS 0 endorsements attached

154%

ACORD CERTIFICATE OF LIABILITY INSURANCE DATE (MM/DD/YYYY) 2/22/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER: Rebecca's Agency Contact
CONTACT NAME: 8138100579
PHONE: 8138100579
FAX: (FAC. No.)
EMAIL ADDRESS: rlompkins@certificatehero.com
ADDRESS: INSURER(S) AFFORDED COVERAGE
INSURER A: CNA Insurance Companies
INSURER B:
INSURER C:
INSURER D:
INSURER E:
INSURER F:

YOUR AGENCY HERE
Address Line 1
Address Line 2
City, State Zip

INSURED: Select Named Insured(s)
Builders, Inc.
95 Rochester Street
Teferboro, NJ 07608

CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

LINE	TYPE OF INSURANCE	ADDITIONAL	POLICY NUMBER	POLICY EFF	POLICY EXP	LIMITS
A	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR		GL9120	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 1,000,000 EXCESS/CO-INSURED PREMISES & EA occurrence \$ 50,000 LIMIT EXP (Any one person) \$ 5,000 PERSONAL & AUTO LIABILITY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPROP AGG \$ 2,000,000

GENL AGGREGATE LIMIT APPLIES PER:
POLICY PROJ LOC
OTHER:

When you click to “Rename” your certificate template, you’ll be prompted to add the new certificate template name.

Click “Yes, Rename This Template” to apply the change.

Rename template?

NEW TEMPLATE NAME

Rename Sample Certificate Template

CANCEL YES, RENAME THIS TEMPLATE

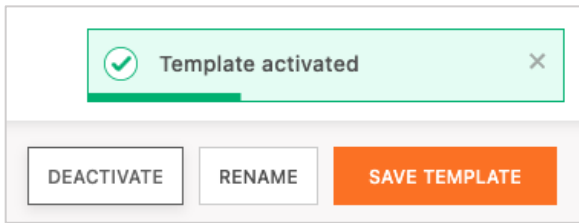
When you click to deactivate the certificate template from within the Template Editor, you will receive confirmation the certificate has been deactivated.

The same button you clicked to deactivate the template has also been renamed “Activate” to allow you to reactivate the certificate template.

Template deactivated

ACTIVATE RENAME SAVE TEMPLATE

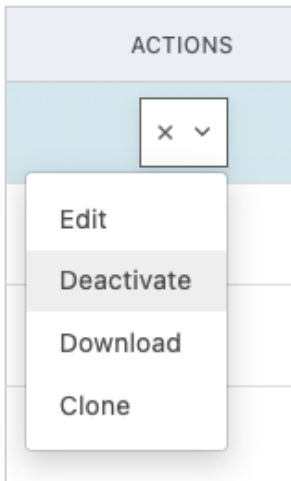
When you click to reactivate the certificate template from within the Template Editor, you will receive confirmation the certificate has been reactivated and that button has again been renamed “Deactivate”.



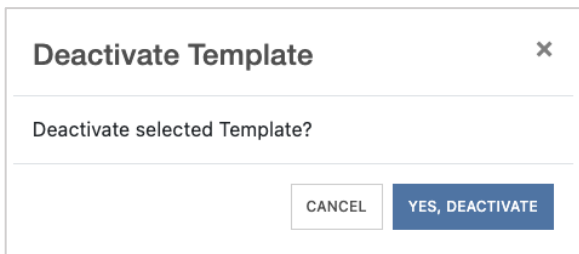
Deactivate

Deactivate will mark the certificate template as inactive so it will no longer show within the Certificate templates manager.

The certificate template can still be viewed by updating the filters to show inactive certificate templates.

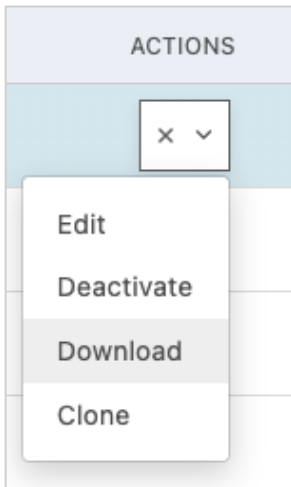


After clicking “Deactivate” from the actions menu, you will be prompted to confirm proceeding with deactivating the selected certificate template.



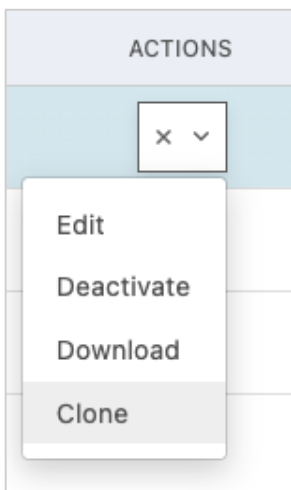
Download

Download will provide a certificate sample using the selected certificate template.



Clone

Cloning a certificate template will create an exact copy of an existing certificate template.



Why clone a certificate template?

Perhaps you have an existing master certificate template that you find you regularly use when issuing a certificate for a specific insured/holder, and the only thing you add to their certificates is specific verbiage (i.e., Additional Insured and Waiver of Subrogation verbiage is required with each requested). You can clone the existing master certificate template that does not include the verbiage, update the cloned certificate template to include said verbiage and holder information, and save for the certificate template future use for that holder/insured.

After clicking Clone, you will be prompted to enter a name for the cloned template.

Click "Submit" to enter the Template Editor.

Rename cloned template ✕

NEW TEMPLATE NAME

Within the Template Editor, after making the necessary updates to the new cloned template, click “Save Template” to return to the Certificate Templates manager.

