CERTIFICATE HERO®

How to Process Certificate Revisions

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What is the difference between a single certificate revision and a bulk revision?

Single Certificate Revision

A single certificate revision allows a user to make a change to a single certificate. This may be utilized when an Insured or Holder requests an update to just one certificate. For instance, a Holder may request 30-day Notice of Cancellation verbiage to be added to a certificate they just received for an upcoming project.

The corresponding walkthrough below will guide you the process of revising a single certificate.

Bulk Revision

A bulk revision allows a user to make changes to multiple certificates at once. This may be utilized when an Insured or Holder requests an update to a group of certificates. For instance, a Holder may request additional verbiage or endorsements to be added to a group of certificates.

The corresponding walkthrough below will guide you through processing a bulk revision.

Processing a Single Revision

## Starting a Single Certificate Revision

To begin a single certificate revision, enter your Certificate Manager by dropping down "Certificates" on the left menu, and clicking the "Manager".
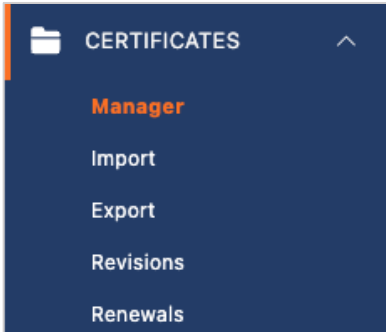
Selecting the Certificate to Revise

Within your Certificate Manager, locate the certificate you need to revise.

You can scroll through the list of certificates or utilize the filters to locate the certificate for revision.
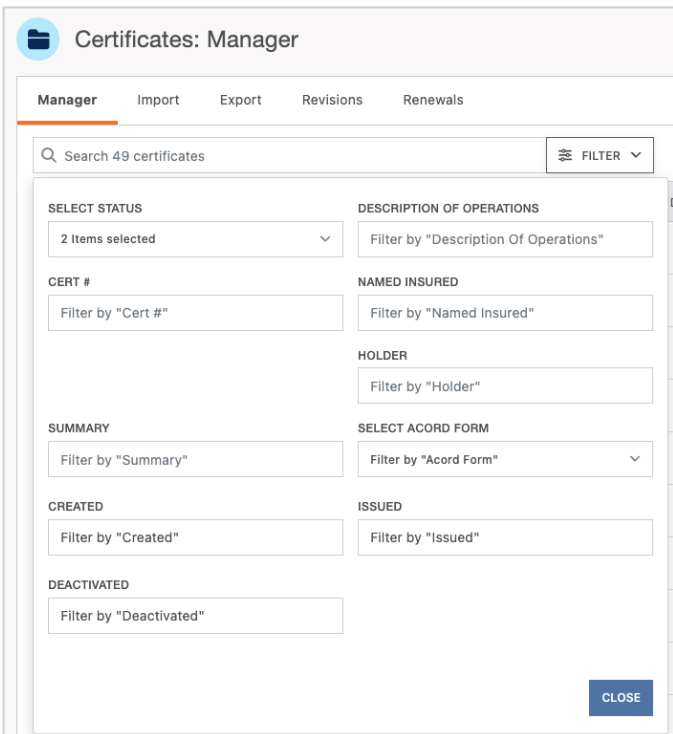
Once you have found the certificate needed for the revision, click the Actions dropdown menu on the far right, and click "Revise".

Identify the Area on the Certificate to Revise

This will take you to the Certificate Editor.

The certificate preview on the right provides a real-time display of any additions and edits you make to a certificate.

The **GREY** selectors indicate areas on the certificate that you can interact with and modify.

For purpose of this walkthrough, we will imagine the revision request is asking for 30-day Notice of Cancellation verbiage to be added, and "required by written contract" verbiage tagged at the end of the Additional Insured/Waiver of Subrogation wording.
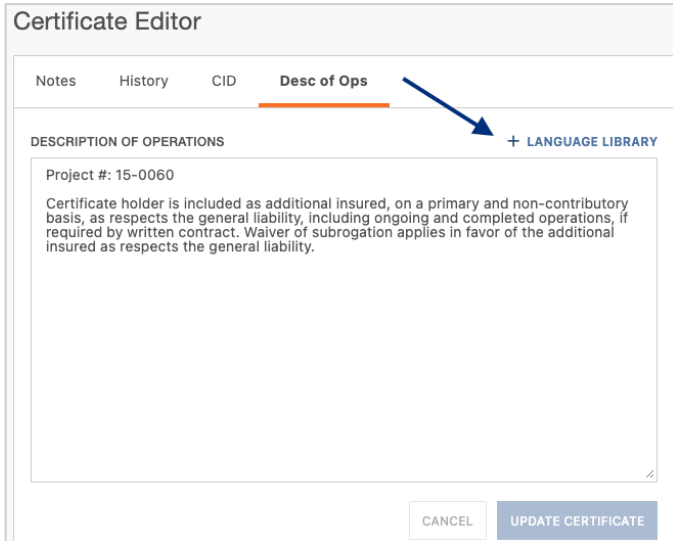
Locate the **GREY** selector for the area which you need to revise, in this case, the Description of Operations.

ACORD®	CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 12/28/2023

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).

Select Contact

PRODUCER	CONTACT NAME: Kristin Collins	
YOUR AGENCY HERE Address Line 1 Address Line 2 City, State Zip	PHONE (A/C, No, Ext): 1-800-HERO	FAX (A/C, No):
	E-MAIL ADDRESS: kcollins@certificatehero.com	

	INSURER(S) AFFORDING COVERAGE	NAIC #
	INSURER A :	

Select Named Insured(s)

INSURED	
Builders, Inc. 95 Rochester Street Teterboro, NJ 07608	INSURER B :
	INSURER C :
	INSURER D :
	INSURER E :
	INSURER F :

COVERAGES	CERTIFICATE NUMBER: 4546350	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	
	COMMERCIAL GENERAL LIABILITY			**Add Policy**			EACH OCCURRENCE	$
	☐ CLAIMS-MADE ☐ OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$
							MED EXP (Any one person)	$
							PERSONAL & ADV INJURY	$
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$
	☐ POLICY ☐ PRO-JECT ☐ LOC						PRODUCTS - COMP/OP AGG	$
	OTHER:							$
	AUTOMOBILE LIABILITY			**Add Policy**			COMBINED SINGLE LIMIT (Ea accident)	$
	ANY AUTO						BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	HIRED AUTOS ONLY NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
	☐ UMBRELLA LIAB ☐ OCCUR			**Add Policy**			EACH OCCURRENCE	$
	☐ EXCESS LIAB ☐ CLAIMS-MADE						AGGREGATE	$
	DED ☐ RETENTION $							$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY	Y/N		**Add Policy**			☐ PER STATUTE ☐ OTH-ER	
	ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	☐	N/A				E.L. EACH ACCIDENT	$
							E.L. DISEASE - EA EMPLOYEE	$
	If yes, describe under DESCRIPTION OF OPERATIONS below						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 **Sign Here** *Signature*

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ACORD 25 (2016/03)   The ACORD name and logo are registered marks of ACORD
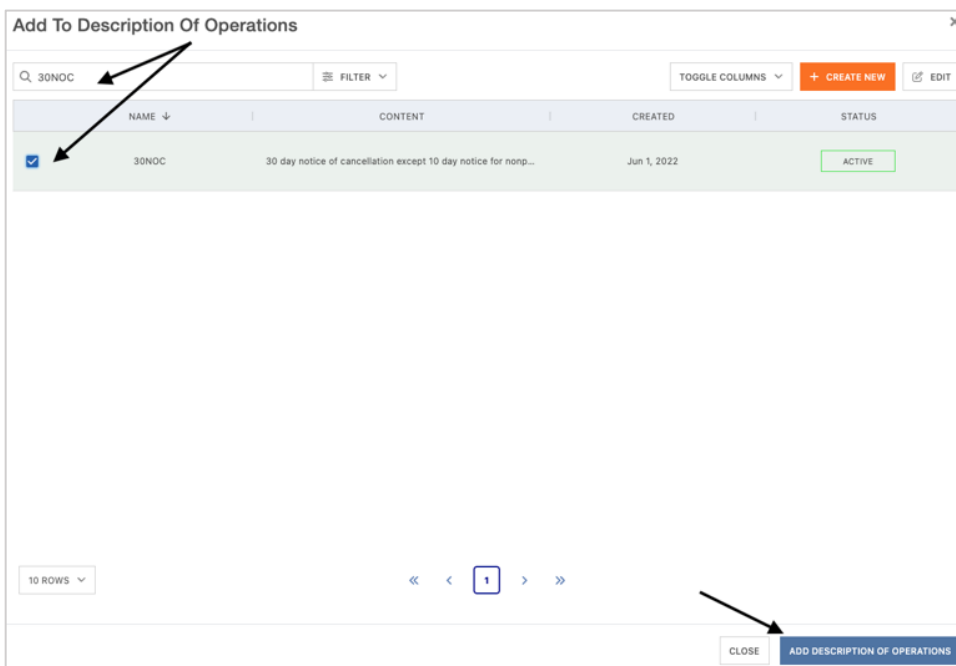
Revising and Saving the Changes

When the DOO editor appears in the CIO resources to the right, begin updating the verbiage to be added.

You can also utilize the verbiage already established in your agency's Language Library.

Select the verbiage and click "Add Description of Operations".

Confirm the verbiage added to the DOO and click "Update Certificate" to add to the ACORD form.

The DOO on your ACORD form has now been updated.

Reviewing and Issuing the Revision

Click "Review" to preview your certificate and proceed with issuance.

Take a moment to preview your revised certificate on the left and add any needed distribution on the right.

When you are ready to issue, select one of the issuance methods at the bottom.

Processing a Bulk Renewal

There are two different ways to start a Bulk Revision:
- From the Certificate Manager
- From the Bulk Revisions Page

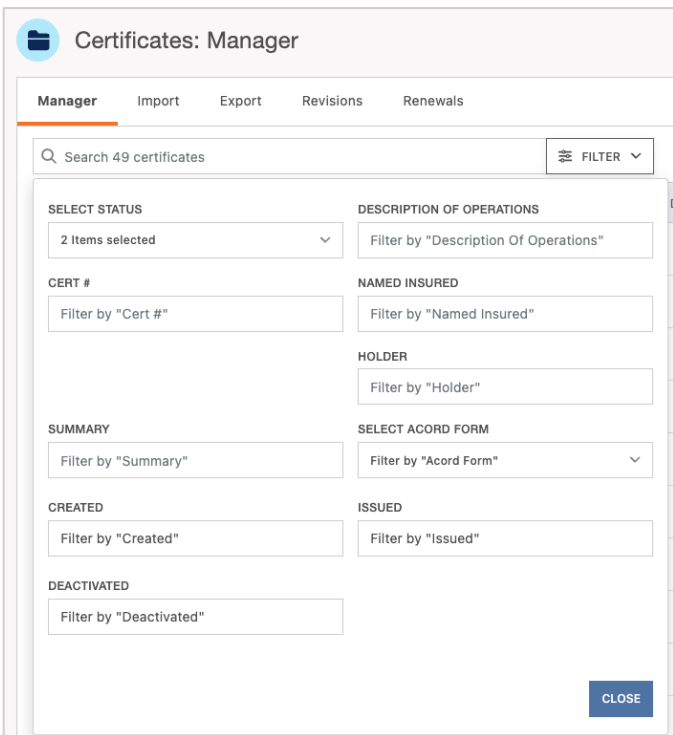## Starting a Bulk Revision from the Certificate Manager

To begin a bulk revision from the Certificate Manager, click the "Certificates" dropdown on the left menu, and then click "Manager".
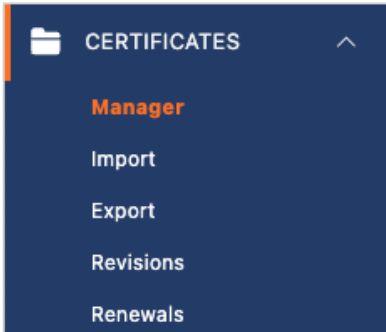

Selecting the Certificates to Revise

Within your Certificate Manager, locate the certificates you need to revise.

You can scroll through the list of certificates or utilize the filters to locate the certificate for revision.

Once you have selected the certificates needed for the revision, click the "Batch Actions" dropdown menu on the far right and click "Revise".
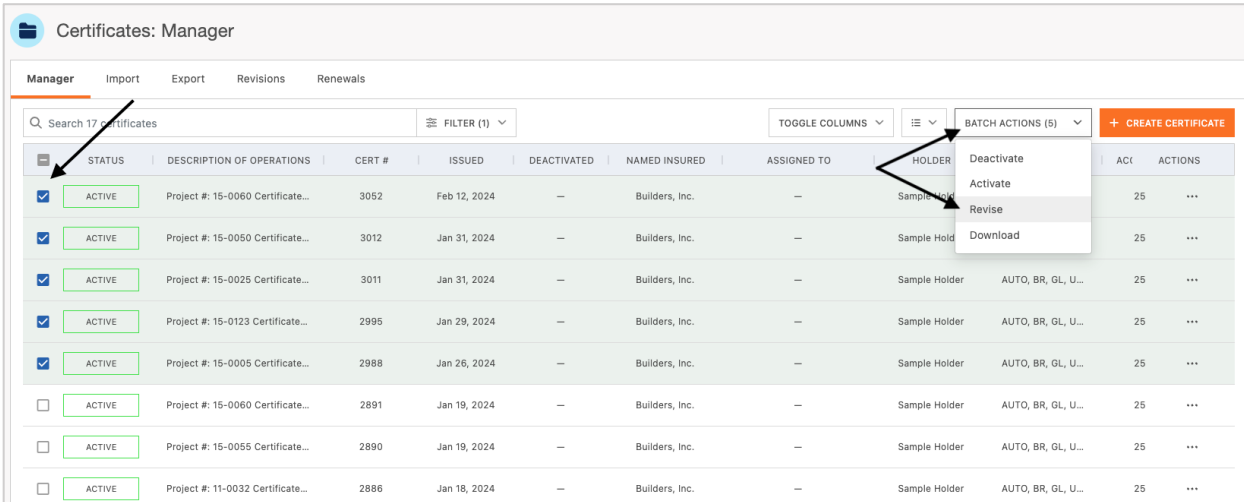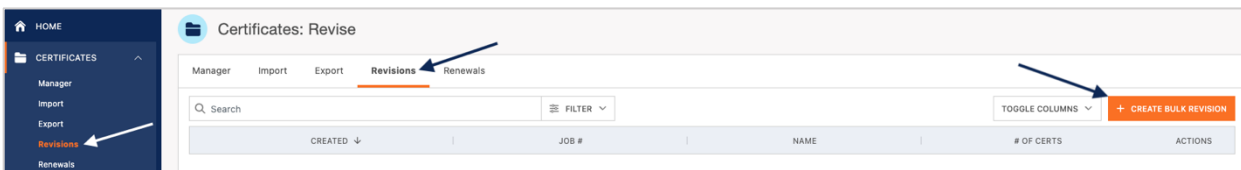

You will be prompted to enter a name for your bulk revision, as well as advised how many certificates were selected for the revision.
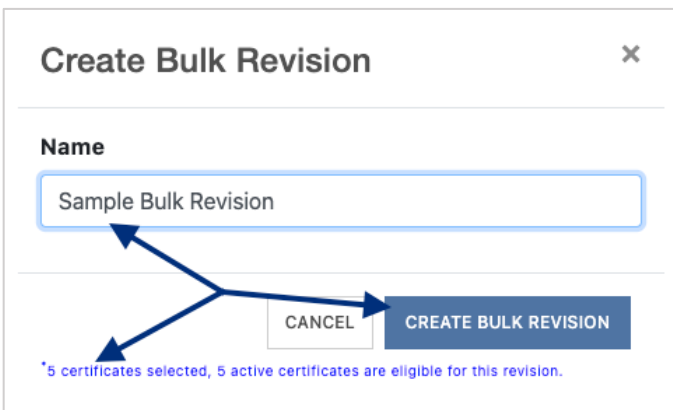
Starting a Bulk Revision from the Bulk Revisions Page

To begin a bulk revision from the Bulk Revisions Page, click the "Certificates" dropdown on the left menu, and then click "Revisions", or click the "Revisions" tab within the Certificate Manager.

Selecting the Certificates to Revise

You will be prompted to select the Named Insured and enter a name for your bulk revision.

You will also be provided a list of Holders that you can choose from that have had a certificate issued for the selected Named Insured.

After filling out the fields, click "Create Bulk Revision" to proceed.

The next screen will confirm all the certificates pulled for the bulk revision based on the criteria in the previous prompt.
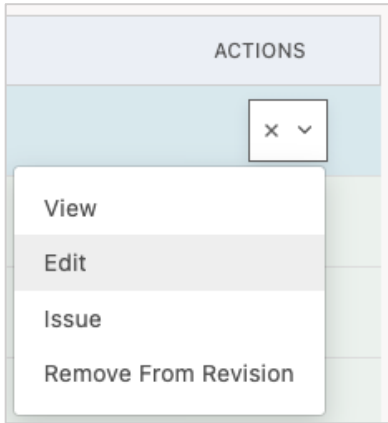
You can select to revise each certificate that populated individually by clicking the Actions dropdown menu on the far right and selecting "Revise".
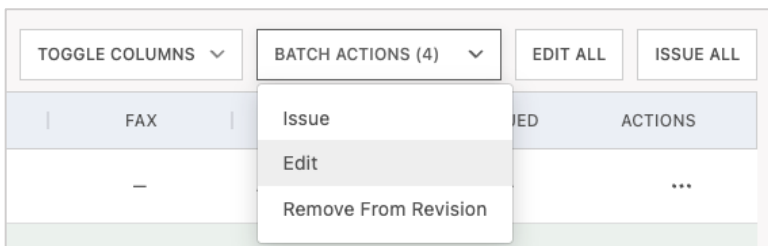

You can also select two or more of the certificates that populated to revise at a time or select all by clicking the upper left box to include all certificates that populated in the edit.

After selecting multiple certificates to revise, click the "Batch Actions" dropdown menu on the far right and select "Edit".

Revising and Saving the Changes

If you have selected to revise each certificate that populated within the bulk revision individually, you will follow the same revision steps as the **single certificate revision**.

Revising individual certificates during a bulk revision will allow you to issue the certificate in bulk with the rest of the certificates.

After completing the revision to the certificate, instead of "Review", you will be able to Save the changes. Clicking "Save" will take you back to the Bulk Revision certificates selector.
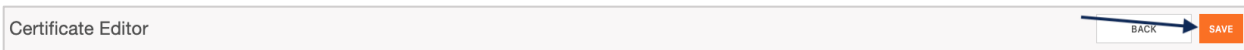

If you have selected multiple certificates to revise at one time and use the Batch Actions option to edit, you will be brought to the Bulk Editor.

Within the Bulk Editor, you can revise the following items of the certificates by clicking on the corresponding tab for that section.

In our example, the requestor has asked for 30-day Notice of Cancellation verbiage to be added to the DOO for all certificates. To update this, click the tab for "Description of Operations".
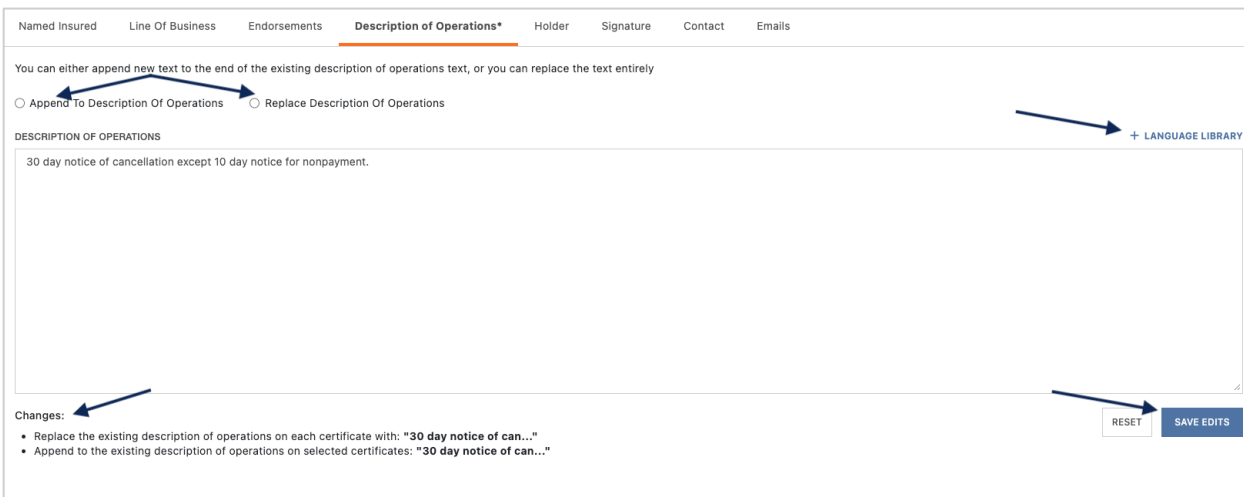
You can either select to append the DOO for all selected certificates or replace the verbiage in the DOO for all selected certificates.
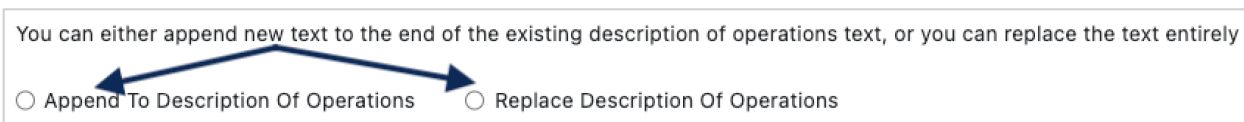
Depending on which you selected, you will receive one of the below messages at the bottom of the editor advising what that selection entails.

Changes:

- Replace the existing description of operations on each certificate with: **"30 day notice of can..."**
- Append to the existing description of operations on selected certificates: **"30 day notice of can..."**

You can also utilize the verbiage already established in your agency's Language Library.

+ LANGUAGE LIBRARY

Select the verbiage and click "Add Description of Operations".

Add To Description Of Operations   ✕

	NAME ↓	CONTENT	CREATED	STATUS
☑	30NOC	30 day notice of cancellation except 10 day notice for nonp...	Jun 1, 2022	ACTIVE

🔍 30NOC   ⇅ FILTER ⌄   TOGGLE COLUMNS ⌄   + CREATE NEW   ✎ EDIT

10 ROWS ⌄   « ‹ 1 › »
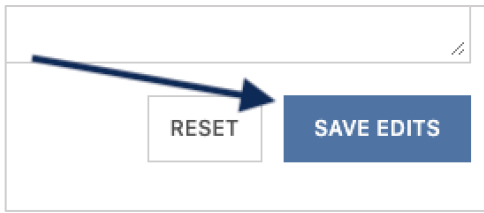
CLOSE   ADD DESCRIPTION OF OPERATIONS

Confirm the verbiage added to the DOO.

DESCRIPTION OF OPERATIONS   + LANGUAGE LIBRARY
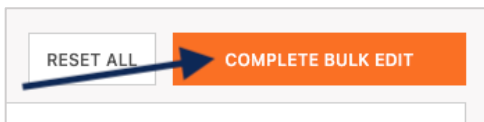
30 day notice of cancellation except 10 day notice for nonpayment.

Click "Save Edits" to save the changes to the selected certificates.

If you need to make additional edits, you can select another tab and proceed with your bulk revision edits.

When you are ready to proceed with issuing, click "Complete Bulk Edit" to return to the bulk jobs and certificate list.

Reviewing and Issuing the Bulk Revision

To proceed with issuing the bulk revision certificates, click "Issue All" in the upper right corner.
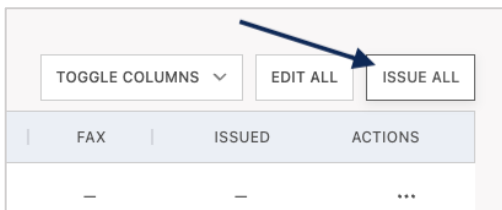
You will receive a prompt that indicates how many certificates are going to be issued.

If any certificates have previous distribution instructions that were added at the original issuance, this will be indicated in the prompt as well.

You'll also be asked if you want to download a copy of the certificates, send via email according to the mid-term distribution, and exclude the endorsement attachments.

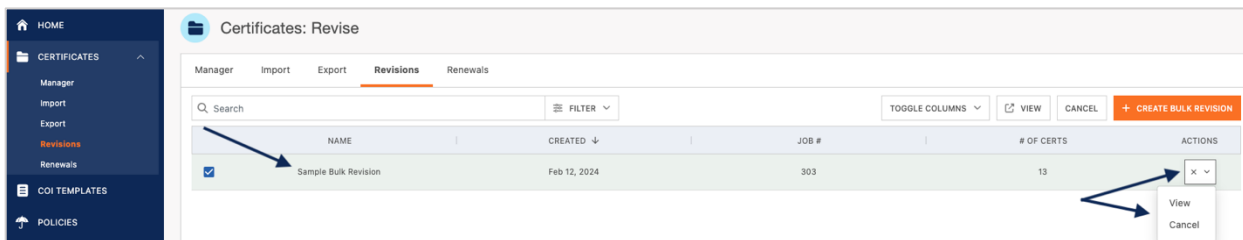Click "Issue" to proceed with issuance.
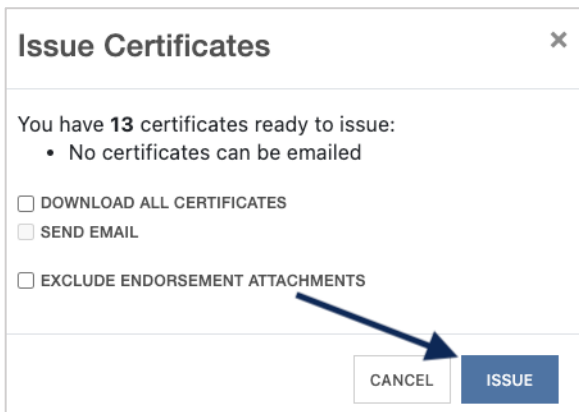
Edit or Cancel a Bulk Revision in Progress

Within the Certificate Manager, a calendar icon will display on any certificates that are part of a bulk job. Hovering over the calendar icon will also advise of the bulk job. These certificates will be unable to be edited or included in another bulk job until the current one is completed or cancelled.

If you had to leave your bulk job for any reason, you can return the same way it was initially started. Upon re-entering the saved bulk revisions, you will be prompted to cancel the bulk job if it is no longer needed, or to view to continue with the bulk job.

If you selected to cancel the bulk job, you will receive a confirmation prompt.
Click "Yes" to proceed with cancelling and you will be brought back to your Certificate Manager.