



**CERTIFICATE
HERO®**

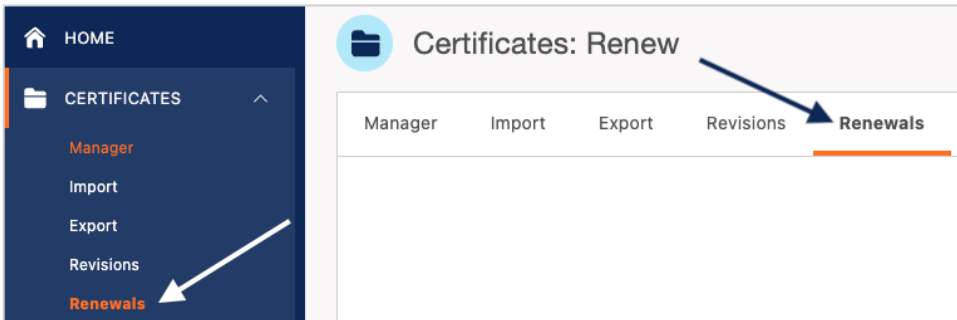
How to Process a Renewal

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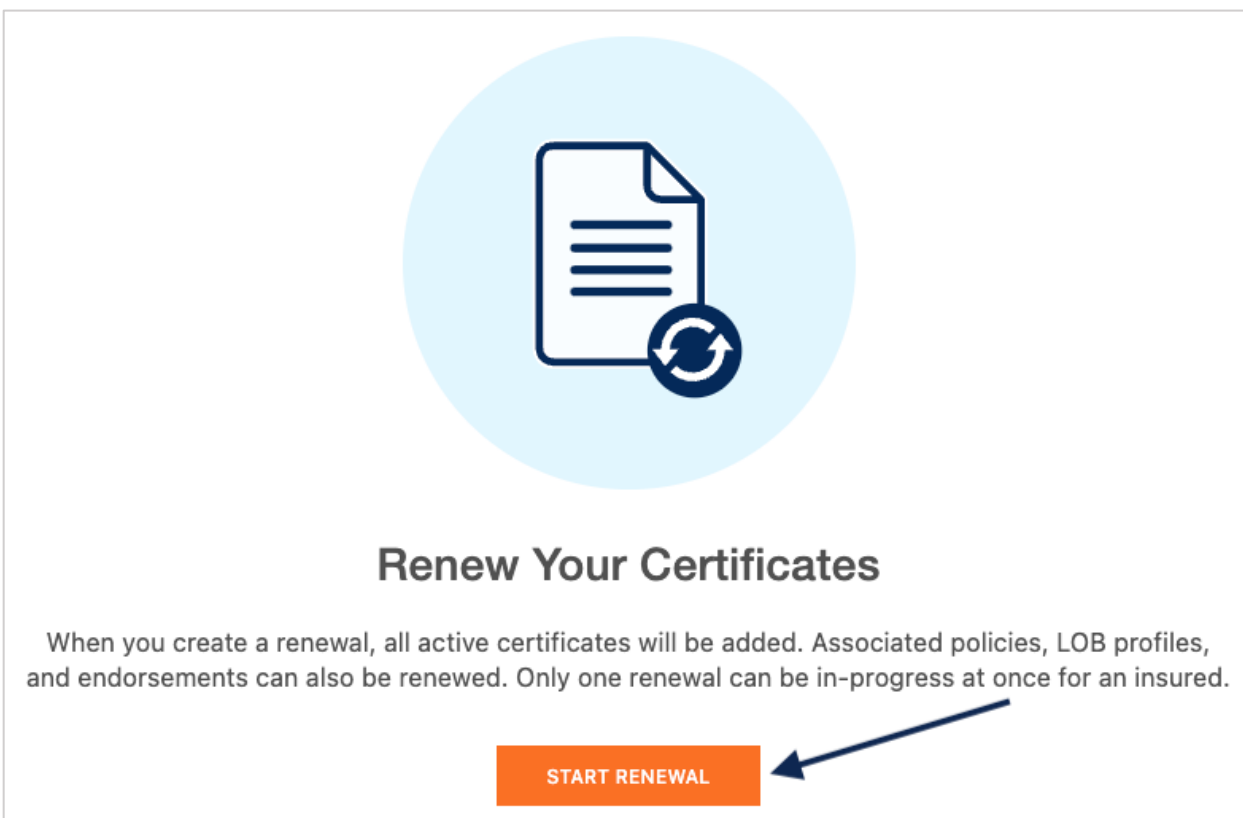
Starting the Renewal

To begin a renewal, drop down “Certificates” and click the “Renewal” option on the left, or “Renewal” tab within the Certificate Manager.



You’ll receive a message advising you that it’s going to pull in only active certificates. You’ll be notified that throughout the process you’re going to renew your underlying policies, line of business profiles and endorsements.

Please Note: Only one renewal per insured at a time can be in progress.



After clicking “Start Renewal”, you’ll see each future step across the top, highlighting the step you’re currently on.



Step 1 – Confirm Certificates

The first step will confirm the certificates you are renewing.

Any active certificates being issued with the renewal will display here.

1 CONFIRM CERTIFICATES 2 RENEW POLICIES 3 RENEW PROFILES 4 RENEW ENDORSEMENTS 5 RENEW CERTIFICATE TEMPLATES 6 RENEW CIDS 7 UPDATE CERTIFICATES **NEXT >**

Confirm Selected Certificates

You can remove certificates you do not wish to renew.

Search 12 Certificates FILTER TOGGLE COLUMNS

<input type="checkbox"/>	ISSUES	CERT #	CREATED ↓	NAMED IN...	HOLDER	DESCRIPTION OF OPERATIONS	EMAIL	FAX	SUMMARY	ENDORSEME...	ACTIONS
<input type="checkbox"/>	✓	3035	Feb 6, 2024	ABC Cons...	City of Ma...	Job 12-0991	kcollins@c...	—	GL	1	...
<input type="checkbox"/>	✓	3030	Feb 6, 2024	ABC Cons...	Constructi...	—	—	—	GL, UMB, ...	1	...
<input type="checkbox"/>	✓	3033	Feb 6, 2024	ABC Cons...	City of Ne...	RE: Work Permit30 day notice of ...	kcollins@c...	—	GL, WC	1	...
<input type="checkbox"/>	✓	3029	Feb 6, 2024	ABC Cons...	City of Shr...	—	—	—	GL, UMB, ...	1	...
<input type="checkbox"/>	✓	3034	Feb 6, 2024	ABC Cons...	University ...	RE: Event in May30 day notice of...	—	—	GL, UMB, ...	1	...
<input type="checkbox"/>	✓	3031	Feb 6, 2024	ABC Cons...	City of Shr...	—	—	—	GL, UMB, ...	1	...
<input type="checkbox"/>	✓	3032	Feb 6, 2024	ABC Cons...	Constructi...	—	—	—	GL, UMB, ...	1	...

Most of the time this will just be a confirmation step.

However, if a certificate clean-up has not yet taken place, or a certificate was missed during clean up, you can do that from here prior to moving forward with the renewal, within the Actions menu on the far right.

ENDORSEME...	ACTIONS
1	...
1	<input type="button" value="x"/> <input type="button" value="v"/>
<div><p>View</p><p>Remove From Renewal</p></div>	
1	...

Click “Next” to continue to the next step.



Step 2 – Renew Policies

Step two will bring you in to renew your policies.

This section will *display any policy that is displayed on at least one certificate that was pulled into the renewal.*

[← BACK](#) ✓ CONFIRM CERTIFICATES **2 RENEW POLICIES** 3 RENEW PROFILES 4 RENEW ENDORSEMENTS 5 RENEW CERTIFICATE TEMPLATES 6 RENEW CIDS 7 UPDATE CERTIFICATES [NEXT >](#)

Renew Policies

Select the new policies you would like to link the current policies to via the dropdown. Lines of Businesses associated with the current policy will be linked automatically.

Search 3 policies FILTER TOGGLE COLUMNS

NAME	LINE OF BUSINESS	POLICY #	CERTS	EFFECTIVE DATE	EXPIRATION DATE ↑	LINK NEW POLICIES
20-21 CUB	Umbrella/Excess Liability	CUB040102020	10	Apr 1, 2020	Apr 1, 2021	SELECT UMB POLICY
20-21 GL	General Liability	GL04012020	12	Apr 1, 2020	Apr 1, 2021	SELECT GL POLICY
20-21 WC	Worker's Compensation	WC04012020	11	Apr 1, 2020	Apr 1, 2021	SELECT WC POLICY

On the left, you will see the expiring policies.

NAME
20-21 CUB
20-21 GL
20-21 WC

On the right, you will see the option to link the renewal policies to replace the expiring policies.

LINK NEW POLICIES
SELECT UMB POLICY
SELECT GL POLICY
SELECT WC POLICY

Click the policy drop down and select the renewal policy.

The screenshot shows a light blue header with the text "LINK NEW POLICIES". Below the header is a white dropdown menu with a downward arrow on the right. The menu is open, showing three options: "SELECT UMB POLICY" at the top, "(2021-04-01) CUB040102021" in the middle, and "Drop Policy" at the bottom.

Repeat this step for each renewing policy.

The screenshot shows a light blue header with the text "LINK NEW POLICIES". Below the header are three stacked dropdown menus, each with a downward arrow on the right. The first menu shows "21-22 CUB (CUB040102021)", the second shows "21-22 GL (GL04012021)", and the third shows "21-22 WC (WC04012021)".

Please Note: The renewal policy information is pulled from your Agency Management System (AMS). If you have renewal policy information entered in your AMS, you'll see the future policy to link for the renewal in Certificate Hero due to the integration with your AMS.

Click "Next" to continue to the next step.

The screenshot shows a rectangular orange button with the text "NEXT" followed by a right-pointing chevron symbol ">".

Step 3 – Renew Profiles

Step three will renew the Line of Business (LOB) profiles.

Because Certificate Hero knows which certificates were expiring, the system also knows what the expiring LOB profiles are.

Assuming nothing changed, Certificate Hero will take the expiring LOB profiles and make a copy of them, referencing the renewal policies.

Renew LOB Profiles

Any LOB profiles tied to policies that were mapped in the previous step can be renamed, replaced, or edited.

Search 3 profiles FILTER TOGGLE COLUMNS

NAME	PRIOR POLICY	LOB SYMBOL	ACORD FORM	LOB TYPE NAME	RENEWAL POL.	CERTS	PROCESSED	LINK NEW LOB
2020 GL (1)	20-21 GL	GL	25	General Liability	21-22 GL	12	X	2021 GL (1) EDIT
2020 CUB (1)	20-21 CUB	UMB	25	Umbrella/Exces...	21-22 CUB	10	X	2021 CUB (1) EDIT
2020 WC (1)	20-21 WC	WC	25	Worker's Comp...	21-22 WC	11	X	2021 WC (1) EDIT

If there were changes to the limits from the expiring term, Certificate Hero will bring attention to anything needing review within the “Processed” column, indicating with a red X.

Click “Edit” to enter the LOB profile and review what changed.

PROCESSED	LINK NEW LOB
X	2021 GL (1) EDIT
X	2021 CUB (1) EDIT
X	2021 WC (1) EDIT

In the example below, the renewal limits increased from \$1M/\$2m to \$2m/\$4m.

You can decide if you want the limits within the LOB profiles to remain as they previously displayed for the renewal. Or, if you would like to pull the renewing limits, click the button under “Revert?” to apply the new limits.

To continue, click “Confirm”.

Edit LOB Profile

Some differences have been detected between the values attached to the new policy in the AMS, and the values in the LOB Profile. Please confirm changes:

Coverage	AMS Value	LOB Profile Value	Revert?
Each Occurrence Limit	\$ 2,000,000	1,000,000	🔄
General Aggregate Limit	\$ 4,000,000	2,000,000	🔄
Personal & Advertising Limit	\$ 2,000,000	1,000,000	🔄
Products - Comp/Op Aggregate Limit	\$ 4,000,000	2,000,000	🔄

CANCEL CONFIRM

Certificate Hero will prompt for you to review the LOB profiles, regardless of if any were made.

After reviewing, click “Save”.

Edit LOB Profile ✕

ACORD FORM
ACORD 25

POLICY
(2021-04-01) GL04012021 21-22 ...

LOB TYPE
GL

LOB TYPE NAME
General Liability

PROFILE NAME
2021 GL (1)

SET AS DEFAULT

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
Unchecked
 PER PROJECT

AMS Value: Unchecked
 PER LOCATION

AMS Value: Not Found
Other Name

EACH OCCURRENCE LIMIT
2,000,000

DAMAGE TO RENTED PREMISES LIMIT
50,000

MEDICAL EXPENSE
5,000

PERSONAL & ADVERTISING LIMIT
2,000,000

GENERAL AGGREGATE LIMIT
4,000,000

PRODUCTS - COMP/OP AGGREGATE LIMIT
4,000,000

AMS Value: 2,000,000

AMS Value: 50,000

AMS Value: 5,000

AMS Value: 2,000,000

AMS Value: 4,000,000

AMS Value: 4,000,000

Coverage Name ✕ Value

[+ ADD OVERFLOW COVERAGE](#)

SAVE

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*.

Once you have resolved any issues in this step, the processed column will update with a **green checkmark**.

PROCESSED	LINK NEW LOB
✓	2021 GL (1) ▼ EDIT
✓	2021 CUB (1) ▼ EDIT
✓	2021 WC (1) ▼ EDIT

Click “Next” to continue to the next step.

NEXT >

Step 4 – Renew Endorsements

Step four will take you in to renew your endorsements.

Like the previous step, assuming nothing change, Certificate Hero will make a copy of your expiring endorsement for the renewing term.

If nothing changed, this also becomes a confirmation step, and you can move along the process.

Renew Endorsements

To renew endorsements, you may choose to replace it with an existing one from the dropdown menu. Or from the actions menu, you can clone, drop, or create a new endorsement.

Search 2 endorsement FILTER TOGGLE COLUMNS

NAME	PRIOR POLICY	CERTS	RENEWAL POLICY	REPLACE ENDORSEMENT
2020 CGD604 02-19 OnComps Arising ...	20-21 GL	10	21-22 GL	2021 CGD604 02-19 ONCO...
2020 CGD316 02-19 WOS Blanket (1)	20-21 GL	2	21-22 GL	2021 CGD316 02-19 WOS B...

However, if something did change resulting in the need to update the endorsement, click the dropdown under the “Replace Endorsement” column and click “Create New Endorsement”.

RENEWAL POLICY | REPLACE ENDORSEMENT

21-22 GL 2021 CGD604 02-19 ONCO... ▼

New! Create New Endorse...

2021 CGD604 02-19 OnComps Arising Blanket (1)

2021 CGD316 02-19 WOS Blanket (1)

Drop Endorsement

On the next screen, click “Select Endorsement Form”.

In order to create an endorsement, you must select the form that the endorsement will implement

SELECT ENDORSEMENT FORM

You can either create a new endorsement form or locate and select an existing endorsement form. After selecting your endorsement form, click “Select Endorsement Form”.

CREATED ↓	NAME	FORM NUMBER	EDITION DATE	LOB TYPE	POLICIES AVAILABLE
<input type="checkbox"/>	Waiver of Transfer of Right...	CG2404	May 2009	General Liability	✓
<input type="checkbox"/>	CGD316 - with coverages	CGD316	Feb 2019	General Liability	✓
<input checked="" type="checkbox"/>	CG604 - with coverages	CGD604	Feb 2019	General Liability	✓
<input type="checkbox"/>	CGD316 - coverages	CGD316	Feb 2019	General Liability	✓
<input type="checkbox"/>	Additional Insured - Engin...	CG2007	Apr 2013	General Liability	✓
<input type="checkbox"/>	CGD604 - Coverages	CGD604	Feb 2019	General Liability	✓
<input type="checkbox"/>	Additional Insured - Owner...	CG2010	Oct 2001	General Liability	✓
<input type="checkbox"/>	XTEND Endorsement For ...	CGD316	Feb 2019	General Liability	✓
<input type="checkbox"/>	Blanket Additional Insured ...	CGD604	Feb 2019	General Liability	✓

Because the policy associated with this endorsement was already renewed, that field will already be filled out.

Enter the new endorsement name and select to either use an existing endorsement form or upload your own. When complete, click “Save”.

FORM NAME: CG604 - with coverages
INSURANCE COMPANY: None Selected
FORM NUMBER: CGD604
EDITION DATE: February 2019
LINE OF BUSINESS: General Liability
COVERAGES: Additional Insured Blanket, Completed Operations, Additional Insured Blanket, Ongoing Operations

ENDORSEMENT NAME: 2021 CG604 - Sample
POLICY: (2021-04-01) GL04012021 ...

DESCRIPTION: Description...
ENDORSEMENT FILE: Use From Endorsement Form, Upload Your Own

UPLOAD AN ENDORSEMENT FILE: Drag and drop your file here or click to browse
ALLOWED FILE TYPE: .PDF

After making any applicable changes to the endorsements, click “Next” to continue to the next step.

NEXT >

Step 5 – Renew Certificate Templates

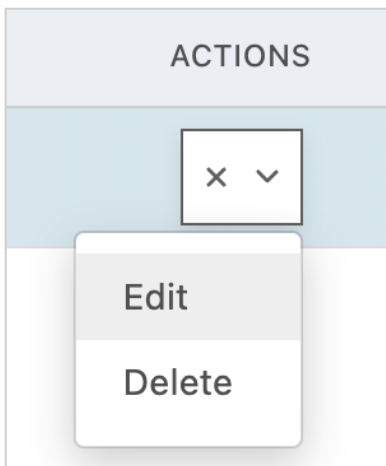
Step 5 will take you in to renew any certificate templates on file that contain one or more of the expiring policies.

The templates are comprised of policies, LOB profiles and endorsements that were already renewed in the three previous sections. So, Certificate Hero will again take any existing template and make a copy of them, referencing the renewal information.

Assuming nothing within your templates will have changed, this step will also become a confirmation step.

CREATED ↓	TEMPLATE NA...	NAMED INSUR...	ACORD FORM	DESCRIPTION ...	SUMMARY	EXPIRATION D...	NOTES	PROCESSED	ACTIONS
Feb 6, 2024	MAINALL (Rene...	ABC Constructi...	25	—	GL, UMB, WC	Apr 1, 2022	Mapped lob pro...	✓	...

If you need to view or make changes to your templates, you can select edit within the Actions menu on the far right.



After making any applicable changes to the endorsements, click “Next” to continue to the next step.

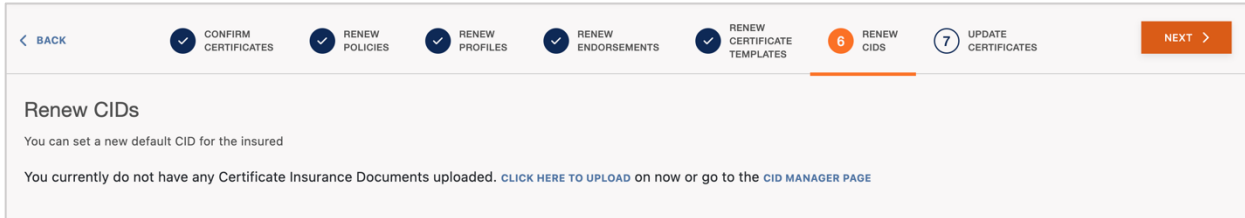


Step 6 – Renew CIDs

The sixth step will allow you to renew any Certificate Issuance Documents (CIDs) on file for the insured, if any are on file.

If you do not have a CID on file for the insure and need to add one, you can add it here by clicking “Click Here to Upload”.

If you do not utilize CIDs, the feature can be turned off for your agency, and this step will disappear for future renewals.



The screenshot shows a progress bar at the top with seven steps: 1. CONFIRM CERTIFICATES, 2. RENEW POLICIES, 3. RENEW PROFILES, 4. RENEW ENDORSEMENTS, 5. RENEW CERTIFICATE TEMPLATES, 6. RENEW CIDS (highlighted with an orange underline), and 7. UPDATE CERTIFICATES. A 'BACK' button is on the left and a 'NEXT >' button is on the right. Below the progress bar, the heading 'Renew CIDs' is followed by the text: 'You can set a new default CID for the insured' and 'You currently do not have any Certificate Insurance Documents uploaded. [CLICK HERE TO UPLOAD](#) on now or go to the [CID MANAGER PAGE](#)'.

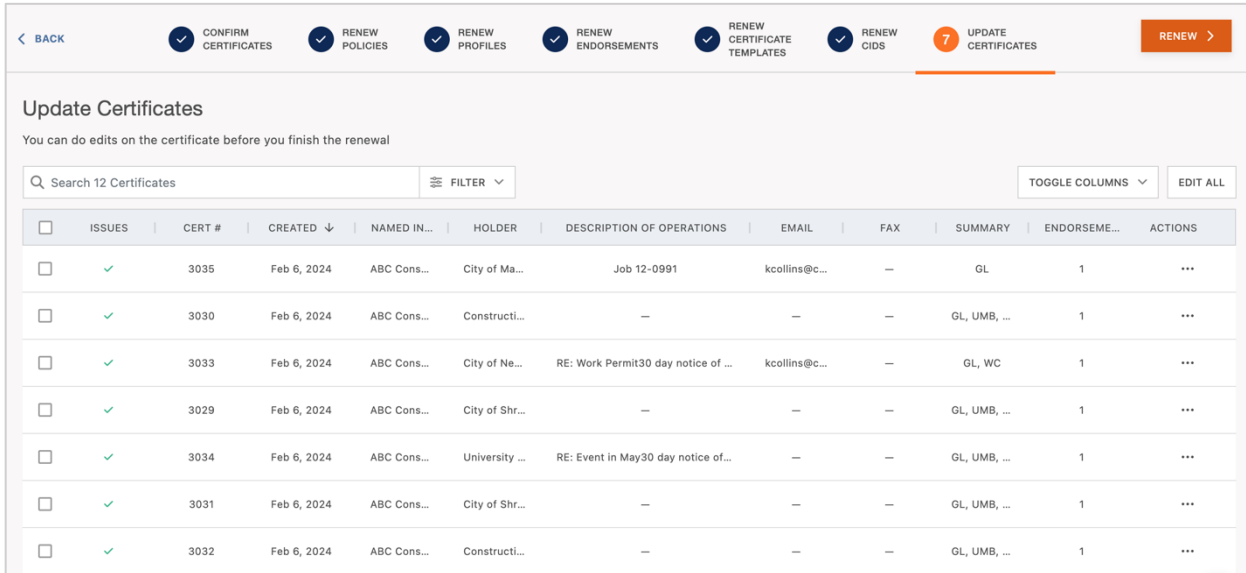
Click “Next” to continue to the next step.



Step 7 – Update Certificates

The final step of the renewal flow will take you to review and issue your renewal certificates.

Most of the time at this stage, this step is another confirmation step, your renewal is complete, and you're ready for issuance.

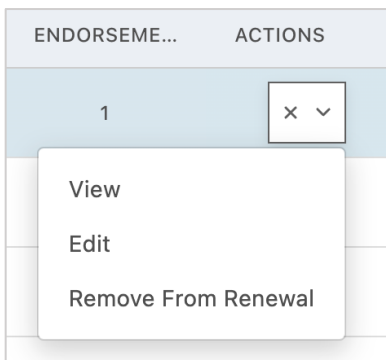


The screenshot shows a web interface for updating certificates. At the top, there is a progress bar with seven steps: CONFIRM CERTIFICATES, RENEW POLICIES, RENEW PROFILES, RENEW ENDORSEMENTS, RENEW CERTIFICATE TEMPLATES, RENEW CIDS, and UPDATE CERTIFICATES (highlighted in orange). A 'RENEW >' button is on the right. Below the progress bar, the heading 'Update Certificates' is followed by the text 'You can do edits on the certificate before you finish the renewal'. There is a search bar for '12 Certificates', a 'FILTER' dropdown, and buttons for 'TOGGLE COLUMNS' and 'EDIT ALL'. The main content is a table with columns: ISSUES, CERT #, CREATED, NAMED IN..., HOLDER, DESCRIPTION OF OPERATIONS, EMAIL, FAX, SUMMARY, ENDORSEME..., and ACTIONS. The table contains seven rows of certificate data.

ISSUES	CERT #	CREATED	NAMED IN...	HOLDER	DESCRIPTION OF OPERATIONS	EMAIL	FAX	SUMMARY	ENDORSEME...	ACTIONS
✓	3035	Feb 6, 2024	ABC Cons...	City of Ma...	Job 12-0991	kcollins@c...	—	GL	1	...
✓	3030	Feb 6, 2024	ABC Cons...	Constructi...	—	—	—	GL, UMB, ...	1	...
✓	3033	Feb 6, 2024	ABC Cons...	City of Ne...	RE: Work Permit30 day notice of ...	kcollins@c...	—	GL, WC	1	...
✓	3029	Feb 6, 2024	ABC Cons...	City of Shr...	—	—	—	GL, UMB, ...	1	...
✓	3034	Feb 6, 2024	ABC Cons...	University ...	RE: Event in May30 day notice of...	—	—	GL, UMB, ...	1	...
✓	3031	Feb 6, 2024	ABC Cons...	City of Shr...	—	—	—	GL, UMB, ...	1	...
✓	3032	Feb 6, 2024	ABC Cons...	Constructi...	—	—	—	GL, UMB, ...	1	...

However, if additional certificate revisions are needed to prior to issuing the renewal, select the certificate to revise and click “Edit” within the Actions menu on the far right.

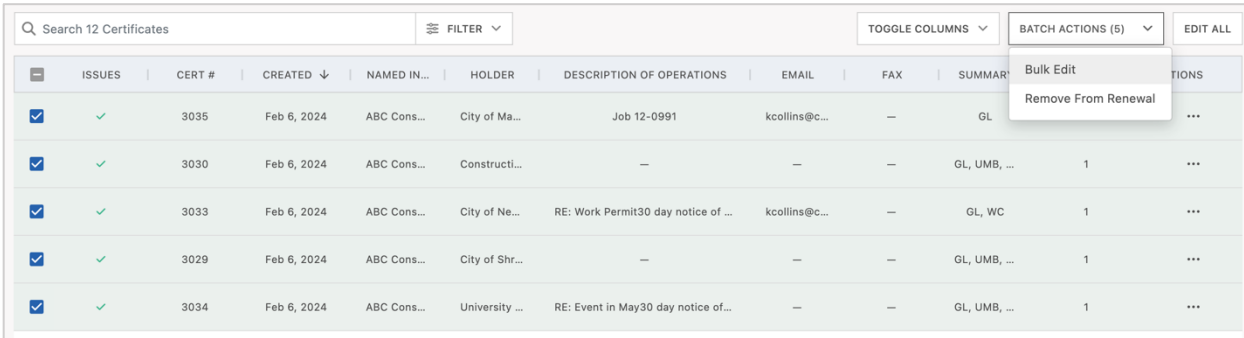
You can also remove a certificate if it is found to be no longer needed by clicking “Remove From Renewal”.



This close-up shows the 'ACTIONS' column of the table. It contains the number '1' and a dropdown menu icon. The dropdown menu is open, showing three options: 'View', 'Edit', and 'Remove From Renewal'.

ENDORSEME...	ACTIONS
1	⌵
View	
Edit	
Remove From Renewal	

If a group of certificates need revisions prior to issuing the renewal, select the group of certificates requiring the change and select “Bulk Edit” within the “Batch Action(s)” dropdown.



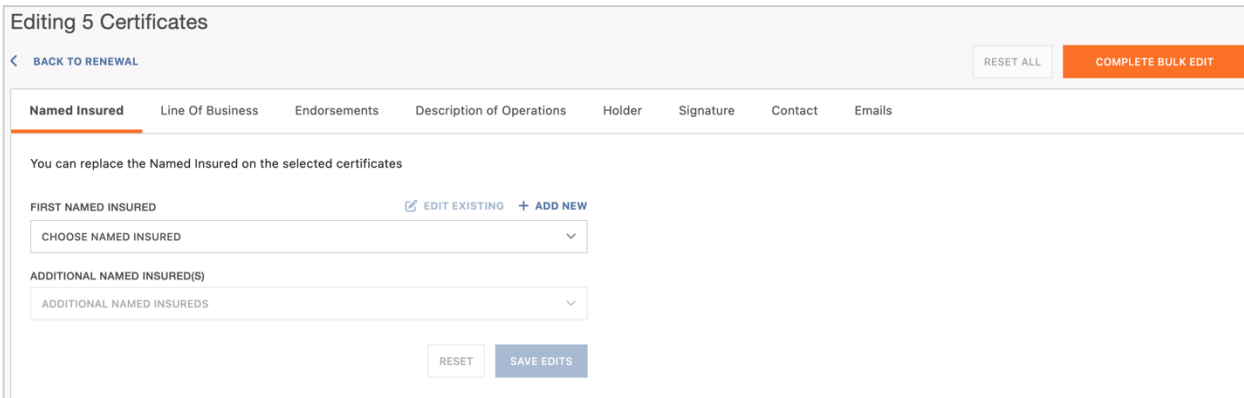
The screenshot shows a table with columns: ISSUES, CERT #, CREATED, NAMED IN..., HOLDER, DESCRIPTION OF OPERATIONS, EMAIL, FAX, SUMMARY, and ACTIONS. Five certificates are listed, all with a checkmark in the ISSUES column. A dropdown menu is open over the first row, showing 'Bulk Edit' and 'Remove From Renewal' options.

ISSUES	CERT #	CREATED	NAMED IN...	HOLDER	DESCRIPTION OF OPERATIONS	EMAIL	FAX	SUMMARY	ACTIONS	
<input checked="" type="checkbox"/>	3035	Feb 6, 2024	ABC Cons...	City of Ma...	Job 12-0991	kcollins@c...	—	GL	...	
<input checked="" type="checkbox"/>	3030	Feb 6, 2024	ABC Cons...	Constructi...	—	—	—	GL, UMB, ...	1	...
<input checked="" type="checkbox"/>	3033	Feb 6, 2024	ABC Cons...	City of Ne...	RE: Work Permit30 day notice of ...	kcollins@c...	—	GL, WC	1	...
<input checked="" type="checkbox"/>	3029	Feb 6, 2024	ABC Cons...	City of Shr...	—	—	—	GL, UMB, ...	1	...
<input checked="" type="checkbox"/>	3034	Feb 6, 2024	ABC Cons...	University ...	RE: Event in May30 day notice of...	—	—	GL, UMB, ...	1	...

This will open the Bulk Editor.

Locate the area within the bulk editor you need to revise and proceed with the revision.

When the required changes are made, click “Complete Bulk Edit” in the upper right corner.



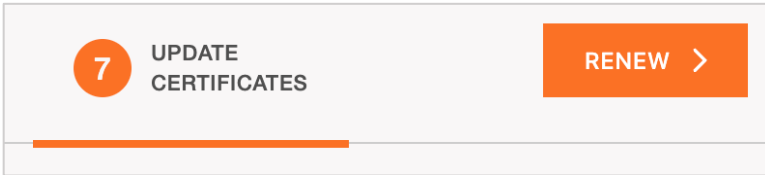
The screenshot shows the 'Editing 5 Certificates' interface. It has a 'BACK TO RENEWAL' link and 'RESET ALL' and 'COMPLETE BULK EDIT' buttons. The main area is titled 'Named Insured' and contains a message: 'You can replace the Named Insured on the selected certificates'. Below this are two dropdown menus: 'FIRST NAMED INSURED' (with 'EDIT EXISTING' and '+ ADD NEW' links) and 'ADDITIONAL NAMED INSURED(S)'. At the bottom are 'RESET' and 'SAVE EDITS' buttons.

After reviewing the renewal certificates, you are ready to issue the certificates.

Issuing the Renewal Certificates

When you are ready to issue your certificates, you'll notice the "Next" button we were previously clicking in the upper right corner has now changed to "Renew".

To proceed with renewal issuance, click "Renew".

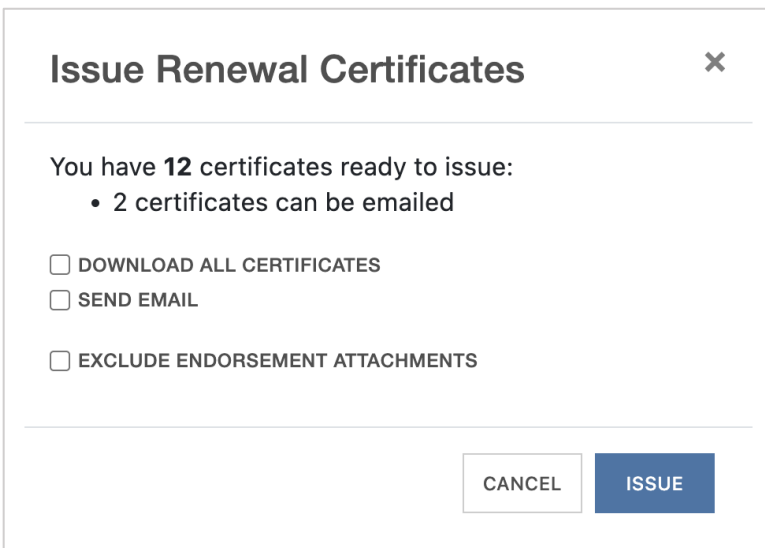


You will receive a prompt that indicates how many certificates are going to be issued.

If any certificates have distribution instructions that were added at mid-term 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.



This will generate your renewal certificates and you will be directed back to your Certificate Manager.

Edit or Cancel a Renewal in Progress

It was mentioned earlier that only one renewal per insured can be in progress. Within the Certificate Manager, a calendar icon will display on any certificates that are part of a renewal, indicating a renewal is in progress. Hovering over the icon will also advise of the renewal.


STATUS	
In Renewal	
ACTIVE	
ACTIVE	
ACTIVE	
ACTIVE	
ACTIVE	
ACTIVE	

If you had to leave your renewal for any reason, you can return to your renewal the same way it was initially started.

Upon re-entering your renewal, you will be prompted to cancel the renewal if it is no longer needed, or to edit the renewal if you need to continue with the flow.


Certificates: Renew

Manager Import Export Revisions **Renewals**



Continue Your Renewals

When you create a renewal, all active certificates will be added. Associated policies, LOB profiles, and endorsements can also be renewed. Only one renewal can be in-progress at once for an insured.



If you selected to cancel the renewal, you will receive a confirmation prompt.

Click “Yes” to proceed with cancelling the renewal and you will be brought back to your Certificate Manager.

Cancel Renewal? ×

Are you sure you wish to cancel the renewal? All in progress data will be lost.
