CERTIFICATE HERO®

The Anatomy of the Certificate Editor

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There are four different ways to initiate the certificate processing flow.

Selecting the ACORD form type

This method will allow you to manually select the desired ACORD form. Certificates can be issued by selecting the required policies or by selecting a previously created certificate template.

Uploading a sample certificate

This method will review a sample certificate and pull the required policies.

Uploading a contract

This method will parse an uploaded contract, scan for the insurance clause, and pull the required policies.

Entering Insurance clause/requirements

This method will allow you to enter the insurance requirements and pull the required policies.

Each of these methods will take you into the Certificate Editor.

This guide will take you through the **Anatomy of the Certificate Editor** and its various segments.

We will review the most common form, the **ACORD 25**.

What is the Certificate Editor?

The Certificate Editor is the instrument used for creating, revising, and issuing certificates of insurance (COI). In this user-friendly interface, each tab and grey selector has its own importance, allowing you to easily customize any part of the certificate.

Notes Tab

The **Notes** tab of the Certificate Editor will display notes pertaining to the Insured(s) and the Certificate.

Insured Notes: General information regarding the Insured(s) and COI processing instructions.

Certificate Notes: Information regarding the specific COI.

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History Tab

The **History** tab offers an overview of the certificate's life cycle providing an audit of actions related to the certificate. This includes key information such as the issuance date and any subsequent revisions made to the COI after issuance.

Certificate Insurance Documents (CID) Tab

The Certificate Issuance Document (CID) is a document that details what is required for processing certificates. If a CID is used by an Agency, it will be displayed within the **CID** tab.

If the CID is not showing and needs to be added, it can be uploaded within the Certificate Editor as well.

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The three above sections will always display, regardless how you have started your certificate. If starting a certificate by **uploading a contract** or by **entering the insurance clause**, the next three additional tabs will populate.

Contracts Tab

If a contract is uploaded or insurance clause is entered, a copy of the contract or insurance clause verbiage will be available for reference within the **Contract** tab.

Insurance Tab

If a contract is uploaded or insurance clause is entered, the details of the insurance requirements will be displayed within the **Insurance** tab.

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Requirements Tab

If a contract is uploaded or insurance clause is entered, you will find the contractually required LOBs within the **Requirements** tab. This will display any compliant and/or non-compliant policies.
You can expand the LOB to review the coverage requirements extracted from the uploaded contract or manually entered insurance clause.

Requirements – Non-Compliant Line of Business(es) (LOB)

A *non-compliant* LOB will be easily identifiable by a highlighted red boarder. To view what is not complaint, you can expand the LOB and a red message will alert you identifying the coverage(s) within the policy is not compliant with the uploaded contract or manually entered insurance clause.

Requirements – Compliant Line of Business(es) (LOB)

A *compliant* LOB, the LOB will *not* have a highlighted red boarder. To verify compliance, you can expand the LOB, and review the coverage requirements identified from the uploaded contract or manually entered insurance clause.

Certificate Preview

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.

You can customize or modify your certificate of insurance by choosing any of the following grey selectors:
- Agency contact name, number, and email
- Named Insured
- Certificate policies
- Description of Operations
- Certificate Holder
- Signature

Updating the Agency Contact

Updating the Named Insured

Updating the Policies

Updating the Description of Operations
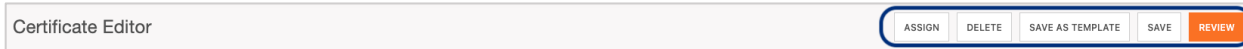

Updating the Certificate Holder

## Updating the Signature

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Completing the Certificate

Once you have completed the creation of your certificate, there are several next options you can take. Across the top of the Certificate Editor, you will find the Editor Action buttons.

Certificate Editor   ASSIGN | DELETE | SAVE AS TEMPLATE | SAVE | REVIEW

Assigning the Certificate

To assign a certificate to another team member to review or work on, click "Assign".

Certificate Editor   ASSIGN | DELETE | SAVE AS TEMPLATE | SAVE | REVIEW
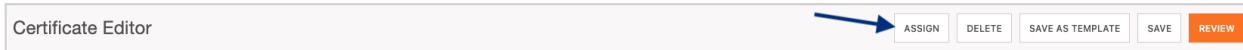
Deleting a Certificate in Progress

If a certificate is no longer needed prior to issuance, click "Delete".

Certificate Editor   ASSIGN | DELETE | SAVE AS TEMPLATE | SAVE | REVIEW

Saving as a Certificate Template

To save the certificate details you just created as a certificate template for future use, click "Save as Template".

Certificate Editor   ASSIGN | DELETE | SAVE AS TEMPLATE | SAVE | REVIEW

Saving Certificate for Later

To save the certificate to come back to work on later, click "Save".

Certificate Editor   ASSIGN | DELETE | SAVE AS TEMPLATE | SAVE | REVIEW
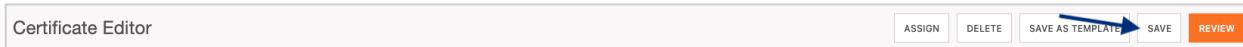
Reviewing the Certificate

To preview the certificate and prepare for distribution, click "Review".

Certificate Editor   ASSIGN | DELETE | SAVE AS TEMPLATE | SAVE | REVIEW
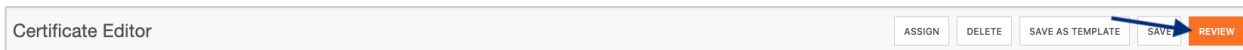
From here, you can review the certificate you just created and prepare for distribution via email/fax.

Certificate Issuance

"Complete" will issue the certificate without distribution and without downloading a copy.

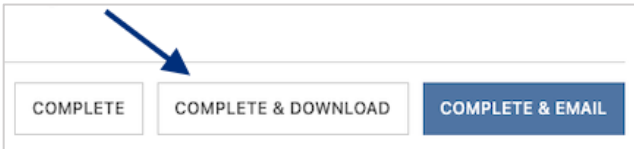"Complete & Download" will issue the certificate without distribution and will download a PDF copy.

"Complete & Email" will issue the certificate and distribute per your email distribution instructions.

"Complete & Fax" will issue the certificate and distribute per your fax distribution instructions.

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