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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.

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# **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.

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# **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.

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## **Insurance Tab**

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Part angle Tay built and the first of the data to request. A support of the second s				SS 900,000, (VE Builders Play required for this project Comp	coverage & required for this project over Fraud Limit of \$1 000,000 will be	(VI) Crime Coverage will be required on required with a Computer Fraue Deduction	the project the following office coverages are ble of \$15,000. Certificates of insurance will be	X c				Add Po	licy				
A definition of the standard and the				provided on request. 30 day n	edice of cancellation except 13 days	solice for non-payment.							-				
A dependence of the service of th			12. An	algement. Either party may assi whetfally all of its assets, or trave	ign Service Order(c) in whole (and in section crossies of existed transaction	it in part) only as part of a scorporate recepts the function allocing the transformed State persons	parization, consolidation, merger, sale of all or USEAG or more of the subdanding solirotocover	X	Contractor's Pollution L	dai				1	MED EXP (Any one person)		
Arrow where y and the there y and the strength of the step y and the step y and the strength of the step y and the ste			of a	asigner, provided that the assign	nee agrees to be bound by the terms	and conditions of these Standard Terror	(inclusing but not limited to all Service Ontern)	A				EPK-130365	03-15-2020	03-15-2021			
Control of the start star										LES PER				1			
Add Registry     A			ex Ca	itomer and remains responsible	to Customer for the delivery of such	Sevices.	way which is using a such beyond to			LOC					PRODUCTS - COMP/OP AGG	\$ 2,000,000	
			13. 00	eening Law; Verse. The party	es vill attempt in good faith to resol	e any dispute within thirty (30) days of n	ofice of a depute through decussion between				+		_		COMBINED SINCLE LIMIT	3	
Big 12 AT THE CONSTRAINED BY CONSTRA												Add Po	licy	1	(Ea accident)	3 1,000,000	
Cold       The production of the first section of the production of the product			RC	HE TO A JURY TRAL FOR AN	ACTION ARISING OUT OF THE	ACPEEMENT, INCLUDING CONTRACT	T CLAMS, TOPT CLAMS, AND ALL CTHER		INNED S	CHEDULED			00.45	00.45.0000		3	
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Address of the first operation of the first o			14. 00	efdentiality. During the Service	Term, each perfy may have access	to certain confidential and proprietary infl	irmation disclosed by the other parts, whether	XX	UTOS ONLY X	UTOS ONLY				1	(Per accident)	3	
No.04 bit first is in bit at a first is in the drag right of called at a start at the trag right of called at a start at the trag right of called at the drag right of called a			(19	Search or all with the second se	ther media isolectively. "Carifident	al Information", Neither party will, without	the prior writter consent of the other party, (a)				+	1000	-			3	
			int	use information that (at was in	the public domain free of any oblig	ation of coefficience at the time it was con	returnizated to the other party: (b) is dehtfully										
WORKERS COMPENSATION Add Policy X PER OTH			10	officiation of confidence of the l	e or any obligation of confidence sub- time it areas means stimulant. Furth sur-	sequent to the time is Add communicated. It is well constant which affire to contact the	n (g) was in the other pany s possibility free of a char rearie's Confidential Information and all		1			EFX-114784	03-15-2020	03-15-2021	AGGREGATE	\$ 5,000,000	_
										5	+	Terrore and			PER COTH	\$	
										Y/N		Add P	slicy	1			_

# **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.

ertificate Editor						ASSION DELETE SAVE AS TEMPLATE SAVE
lotes History CID Cont	ract Ins	surance	Requirements Holder			ENDORSEMENTS V 0 endorsements attached
dicates some coverages are not compl	ant					145% ~ 🕞 🕀
Automobile Liability				- REMOVE LOB	~	ACORD <sup>®</sup> CERTIFICATE OF LIABILITY INSURANCE
🕩 General Liability				- REMOVE LOB	~	THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFTIRMATIVELY OR NEGATIVELY AMEND, EXTERIO OR ALTER THE COVERAGE AFFORDED BY THE POLCIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER AND THE CERTIFICATE HOLDER.
Umbrella/Excess Liability				- REMOVE LOB	~	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 like of such endorsement(s).
- , ,						Imposite         Control         Aug.
Worker's Compensation				- REMOVE LOB	~	Friendswood, TX 77546 NSURER), AFFORDMC COVERAGE NACE NULLER, Curu & Forster Specialty In so 44550 NSURER Curu & State Automotion Mutual Insurance Co. 25135
				+ LINE OF BUS	INESS	TEST NAMED INSURED 19801 123 Main St Neurer 0 :
						Nashville, TH 37219 INNURER E: UNURER F: UNURFF: UNURER F: UNURER F: UNURER F: UNURER
						THIS IS TO CERTRY THAT THE POLICES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURD NAME DAVOUT FOR THE POLICY PEROC INDICATE. NOTWINTSHANDIG ANY REQUIREMENT, TERM OR CONTONTO N° AVY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHCH THE CERTIFICATE MAY BE ISSUED OR MAY PERTAN. THE INSURANCE AFFORDED BY THE POLICES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS EXCLUSIONS AND CONDITION OF SUCH POLICIES. LIMITS BYOM MAY HAVE BEEN RESULCED BY AND CLAMS.
						INSR TYPE OF INSURANCE INSD. POLICY NUMBER POLICY FEED UNITS
						Commission Commissi Commission Commission Commission Commission Commission Commissi
						A EPK-130365 03-15-2020 03-15-2021 PRESONAL ANY NUMBER 1 0.0000 GRYL AGOREGATE LIMIT APPLIES PER 1 0.00000
						X         PROUCTS         COMPORE ALL 00         9         2,000,000         0
						X         ANY AUTO         BOOLLY NURRY (Her person)         \$           B         OWNED         SCHEDULED         10019398CA         03-15-2021         050LV NURRY (Her person)         \$
						X UWBRELLALIAB OCCUR Add Policy EACH OCCURRENCE \$ 5,000,000
						A         Excess use         CLARS MODE         EFX.114784         03.15-2020         03.15-2020         Address are strained         \$           000.D         RECENTION IS         Address are strained         Address are strained         \$         \$
						Add Policy XI STATUE 0114 ANYROCERETOREARTHREEXECUTIVE Y/N ANYROCERETOREARTHREEXECUTIVE Y/N

### **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.

tes	History	CID	Contract	Insurance	Requirement	s Holder	
icates	some coverage	es are not	compliant				
🕩 Ger	neral Liability						- REMOVE LOB
_	-		ice in an amount n	ot less than 2000	0000 per occurrence a	nd 4000000 <u>Show More</u>	
_	-		ice in an amount n	ot less than 2000	000 per occurrence a	nd 4000000 <u>Show More</u>	
_	-	ility insurar	ice in an amount n CONTRA		0000 per occurrence a COVERAGE	nd 4000000 <u>Show More</u> COMPLIANT	
Comm	ercial general liabil	ility insurar		ст			
Commo	ercial general liabil REQUIREMENT	ility insurar	CONTRA	.ст 200	COVERAGE	COMPLIANT	ACTIONS

### **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.

otes	History	CID	Contract	Insurance	Requirement	ts Holder	
- Auto	mobile Liabil	itv					- REMOVE LOB
- Auto		ity					
		-	to with a combined	single limit of 10	00000 per accident i	for bodi <u>Show More</u>	
		-	to with a combined	single limit of 10	00000 per accident	for bodi <u>Show More</u>	
Automob		-	to with a combined CONTRA		00000 per accident COVERAGE	for bodi <u>Show More</u>	ACTIONS
Automot	oile liability symbo	ol 1 any au		ICT			ACTIONS

# **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

ACORD <sup>®</sup> CERTIFICATE OF LIA	BILIT	Y INSI	JRANC	E [		MM/DD/YYYY) 28/2023
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITU REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.	EXTEND	OR ALTE	ER THE CON	ERAGE AFFORDED E	BY THE (S), AU	POLICIES
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the If SUBROGATION IS WAIVED, subject to the terms and conditions of th this certificate does not confer rights to the certificate holder in lieu of s	he policy,	certain po	olicies may r		t. Asta	
PRODUCER	CONTACT NAME:	Marcelo				
	PHONE	(305) 3	43-6023	FAX (A/C, No):		
Highpoint Insurance Group, LLC. 1300 FM 2351	É-MAIL	(305) 3 marce.sc	aglione@gma	ail.com		
Friendswood, TX 77546	ADDRESS:					NAIC #
			URER(5) AFFOR	DING COVERAGE		NAIC#
ISURED Select Named Insured(s)	INSURER A					
Select Named Insured(s)	INSURER B					
Blackhawk Measurement Consulting LLC	INSURER C					
O BOX 248	INSURER D					
Vickett, TX 79788	INSURER E					
	INSURER F	:				
COVERAGES CERTIFICATE NUMBER: 4546350 THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HA				REVISION NUMBER:		
INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORD EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE	OF ANY C ED BY TH BEEN RED	ONTRACT	OR OTHER D S DESCRIBED PAID CLAIMS.	OCUMENT WITH RESPE	CT TO V	VHICH THIS
SR TYPE OF INSURANCE ADDL SUBR POLICY NUMBER	P	OLICY EFF	POLICY EXP (MM/DD/YYYY)	LIMIT	s	
COMMERCIAL GENERAL LIABILITYAdd P				EACH OCCURRENCE	\$	
CLAIMS-MADE OCCUR	oncy			DAMAGE TO RENTED PREMISES (Ea occurrence)	\$	
				MED EXP (Any one person)	s	
				PERSONAL & ADV INJURY	s	
GEN'L AGGREGATE LIMIT APPLIES PER:			-	GENERAL AGGREGATE	s	
POLICY PRO- LOC			-			
				PRODUCTS - COMP/OP AGG	\$	
				COMBINED SINGLE LIMIT		
AUTOMOBILE LIABILITY Add P	olicy			COMBINED SINGLE LIMIT (Ea accident)	\$	
ANY AUTO OWNED SCHEDULED				BODILY INJURY (Per person)	\$	
				BODILY INJURY (Per accident)		
HIRED NON-OWNED AUTOS ONLY AUTOS ONLY			-	PROPERTY DAMAGE (Per accident)	\$	
					\$	
UMBRELLA LIAB OCCUR	Policy			EACH OCCURRENCE	\$	
EXCESS LIAB CLAIMS-MADE			-	AGGREGATE	\$	
DED RETENTION \$				050	\$	
WORKERS COMPENSATION AND EMPLOYERS' LIABILITY	Policy			PER OTH- STATUTE ER		
ANYPROPRIETOR/PARTNER/EXECUTIVE Y/N OFFICER/MEMBEREXCLUDED? N/A				E.L. EACH ACCIDENT	\$	
(Mandatory in NH)				E.L. DISEASE - EA EMPLOYEE	\$	
If yes, describe under DESCRIPTION OF OPERATIONS below				E.L. DISEASE - POLICY LIMIT	\$	
ESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedu	ule, may be at	tached if more	e space is require	d) Edit Descripti	ion of O	perations
ERTIFICATE HOLDER	CANCE	LATION				
	THE E ACCOR	XPIRATION DANCE WI	DATE THE	ESCRIBED POLICIES BE C REOF, NOTICE WILL I Y PROVISIONS.	ANCELL BE DEL	ED BEFORE IVERED IN
	AUTHORIZI	ED REPRESE	TATIVE	Signatur	8	
	-	0.45		0		4
CORD 25 (2016/03) The ACORD name and logo a	re registe			ORD CORPORATION.	All righ	its reserve

## **Updating the Agency Contact**

ich endorsement(s).	Select Contact
CONTACT TEST AGENCY CONTACT	
PHONE (A/C, No, Ext): (555) 555-5555	FAX (A/C, No): (555) 555-5550
E-MAIL ADDRESS: testcontact@testagency.com	

### **Updating the Named Insured**



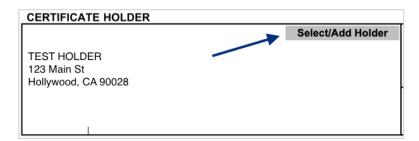
### **Updating the Policies**

INSR LTR			SUBR WVD		POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMIT	s
	COMMERCIAL GENERAL LIABILITY			Add Policy			EACH OCCURRENCE	\$ 2,000,000
	CLAIMS-MADE X OCCUR			Hautenby			DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 50,000
	X Contractor's Pollution Liab						MED EXP (Any one person)	\$ 5,000
A		×	×	EPK-130365	03-15-2020	03-15-2021	PERSONAL & ADV INJURY	\$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	\$ 2,000,000
	X POLICY PRO- JECT LOC						PRODUCTS - COMP/OP AGG	\$ 2,000,000
	OTHER:							\$

## Updating the Description of Operations

ľ	DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Edit Description of Operations
Ľ	

### **Updating the Certificate Holder**



## **Updating the Signature**

AUTHORIZED REPRESENTATIVE Signature Sign Here

# **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

SAVE AS TEMPLATE

SAVE

DELETE

### **Assigning the Certificate**

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

Certificate Editor delete save as template save

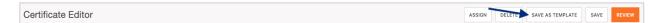
## **Deleting a Certificate in Progress**

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

Certificate Editor

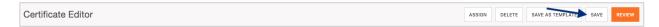
### Saving as a Certificate Template

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



### **Saving Certificate for Later**

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



### **Reviewing the Certificate**

To preview the certificate and prepare for distribution, click "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	COMPLETE & DOWNLOAD	COMPLETE & EMAIL

"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	COMPLETE & DOWNLOAD	COMPLETE & EMAIL

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

COMPLETE	COMPLETE & DOWNLOAD	COMPLETE & FAX