



How to Issue a Certificate - Uploading a Contract

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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 allow you to upload a sample certificate and add the required policies base on the sample.

Uploading a contract

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

Entering insurance clause/requirements

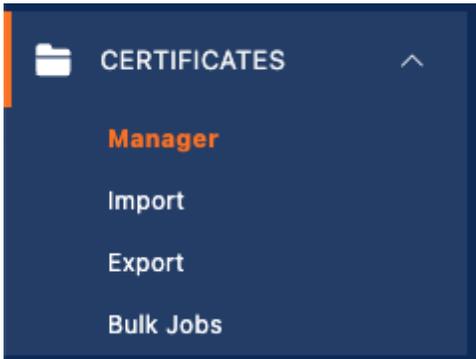
This method will allow you to enter the insurance requirements and pull the required policies.

This guide will take you through how to issue a certificate by [Uploading a contract](#).

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

Starting the Certificate Issuance Process

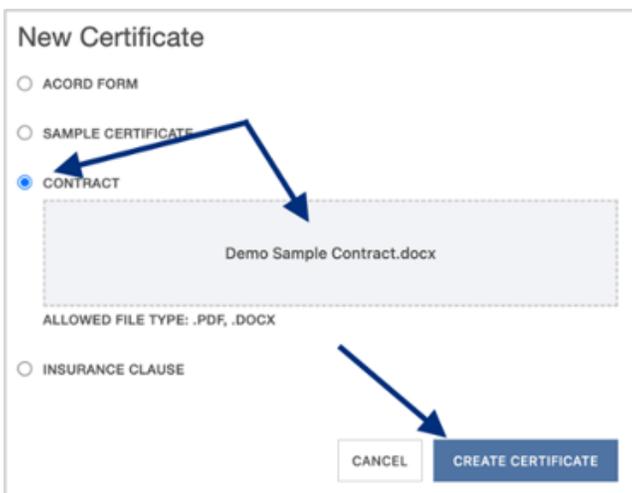
To begin, drop down the “Certificates” menu and click “Manager”.



Within the Certificate Manager, click the orange “Create Certificate” button.



Select “Contract” and select the **contract** you want to upload from your device. Click “Create Certificate” to proceed.



Certificate Editor

This will bring you to the Certificate Editor, where you can add and remove the windows that appear. You can have an few as one window, and as many as four – depending on your viewing preference.

The screenshot shows the 'Certificate Editor' interface. On the left, there is a sidebar with a list of coverages: Builders Risk, Automobile Liability, Professional Liability / Errors & Omissions, General Liability, Worker's Compensation, and Umbrella/Excess Liability. Each coverage has a 'REMOVE LOB' button. At the bottom of the sidebar is a '+ LINE OF BUSINESS' button. The main area on the right displays a 'CERTIFICATE OF LIABILITY INSURANCE' form. The form includes fields for 'PRODUCER', 'YOUR AGENCY HERE', 'INSURED', and 'COVERAGES'. The 'COVERAGES' section is a table with columns for 'TYPE OF INSURANCE', 'POLICY NUMBER', 'EFFECTIVE DATE', and 'LIMITS'. The table lists several policies, including Commercial General Liability (GL9120), Automobile Liability (CAU9120), and Umbrella/Excess Liability (EXCESS9120).

Customizing the Certificate Editor View

To view additional windows, in the upper right corner select the “Add Column” dropdown. Select the window you would like to view, and an additional window will appear on the screen.

The screenshot shows the 'ADD COLUMN' dropdown menu. The menu is open, showing a list of options: Contract, Query, Notes, History, and Documents. The 'ADD COLUMN' button is located in the upper right corner of the interface.

The image below is an example of the user viewing the maximum number of windows, in this case viewing the Insurance requirements, the ACORD form, the contract that was uploaded, and the attached internal Documents.

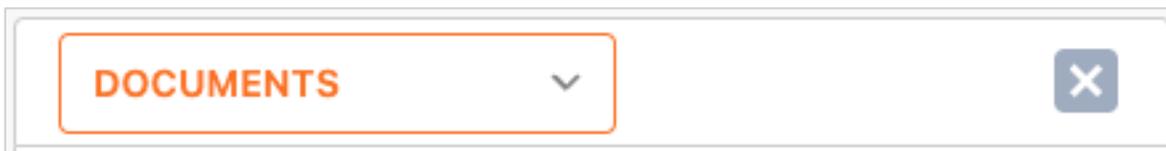
The screenshot displays the 'Certificate Editor' interface with four overlapping windows:

- INSURANCE:** A list of coverages with 'REMOVE LOB' buttons. A red banner indicates 'Indicates some coverages are not compliant'. Coverages include Builders Risk, Automobile Liability, Professional Liability / Errors & Omissions, General Liability, Worker's Compensation, and Umbrella/Excess Liability. A '+ LINE OF BUSINESS' button is at the bottom.
- CERTIFICATE:** Shows 'ENDORSEMENTS' with '0 endorsements attached'. It displays an ACORD 'CERTIFICATE OF LIABILITY INSURANCE' form with various fields and tables.
- CONTRACT:** Shows 'CLEAR HIGHLIGHTING' and 'QUICK FINDS'. It displays a 'Master Services Agreement' with a table of 'Primary Business Center' and 'Primary Billing Center' details.
- DOCUMENTS:** Shows 'EDIT EXISTING' and '+ ADD NEW'. It displays a document titled 'BUILDERS INC CID' with a table of 'CID Form' data.

The dropdown at the top of each window will allow you to switch to any window that is not currently displayed. Simply click the dropdown and select a different window's content to view.

If you would like to close out of one of the windows to reduce the number of items on the screen, you can click the X in the upper right corner of the window.

You can continue to click this X until you have the number of windows on the screen that fits your preferred view.



Depending on the number of windows you are viewing, you can also change the view of your window by selecting one of the tabs at the top of each window.

Certificate Editor ADD COLUMN ▾ REVIEW

Notes History Documents Contract Insurance **Certificate** Query

ENDORSEMENTS ▾ 0 endorsements attached

138% ▾

ACORD
CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 3/4/2025

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	CONTACT NAME John Smith	DATE (MM/DD/YYYY)
YOUR AGENCY HERE	PHONE (555) 555-5555	TAX ID# (555) 555-4444
Address Line 1	FAX (555) 555-5555	
Address Line 2	EMAIL smith@certificatehero.com	
City, State, Zip	INSURER(S) AFFORDING COVERAGE	
	INSURER A: USLI Investment Corporation	NAIC # 21518
	INSURER B: Fireman's Fund Insurance Company	21873
	INSURER C: Security National Insurance Co	33120
	INSURER D: Travelers Insurance Company	36137
	INSURER E:	
	INSURER F:	

COVERAGES **CERTIFICATE NUMBER:** 14941 **REVISION NUMBER:**

LINE	TYPE OF INSURANCE	INSURANCE	POLICY NUMBER	START DATE (MM/DD/YYYY)	END DATE (MM/DD/YYYY)	LIMITS
B	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> GEN'L AGGREGATE LIMIT APPLIES PER: POLICY <input type="checkbox"/> AGG <input checked="" type="checkbox"/> LOC <input type="checkbox"/> OTHER	GL9120	09-01-2020	09-01-2021	EACH OCCURRENCE	\$ 1,000,000
					EXCESS LIABILITY	\$ 50,000
A	<input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED <input type="checkbox"/> SCHEDULED <input type="checkbox"/> AUTOS ONLY <input type="checkbox"/> AUTOS <input type="checkbox"/> NON-OWNED <input type="checkbox"/> AUTOS ONLY	CAU9120	09-01-2020	09-01-2021	COMBINED SINGLE LIMIT (Per person)	\$ 1,000,000
					BODILY INJURY (Per person)	\$
					BODILY INJURY (Per accident)	\$
					PROPERTY DAMAGE (Per accident)	\$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE	EXCESS9120	09-01-2020	09-01-2021	EACH OCCURRENCE	\$ 5,000,000
					AGGREGATE	\$ 5,000,000
C	<input type="checkbox"/> WORKERS COMPENSATION AND EMPLOYER LIABILITY <input type="checkbox"/> ANY EMPLOYER/EMPLOYEE/CONTRACTOR/INDEPENDENT CONTRACTOR/EXCLUDED?	WC9135	09-01-2020	09-01-2021	E.L. EACH ACCIDENT	\$ 1,000,000
					E.L. EACH ACCIDENT	\$ 1,000,000

Certificate Editor Views

Certificate Editor

Notes History Documents Contract Insurance Certificate Query

Notes

Displays notes pertaining to the Insured and the Certificate.

Certificate Editor

NOTES ▾ ✕

INSURED NOTES

Notes that pertain to the current insured goes here.

CERTIFICATE NOTES

Notes that pertain to this specific certificate goes here.

SAVE

History

Displays an audit of activities related to the certificate.

Certificate Editor			
HISTORY			
Origin	Certificate#	User	Issued at
REVISE	14961	nvandgrift@certificatehero.com	—
REVISE	14960	nvandgrift@certificatehero.com	3/7/2025, 10:14:47 AM
EDITOR	14957	nvandgrift@certificatehero.com	3/6/2025, 4:59:49 PM

Documents

Displays any internal documents uploaded by an agency that helps support the issuance of a certificate for the Insured the user is processing in.

Certificate Editor																																																																																																																																																																																					
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Contract

Displays a copy of the contract that was uploaded.

Certificate Editor

CONTRACT

CLEAR HIGHLIGHTING QUICK FINDS

1 6 120%

Master Services Agreement

Customer Information:

	Primary Business Contact	Primary Billing Contact
Customer Legal Name	ABC Construction	John Harris
Contact Name	John Harris	
Street Address	2345 Beacon Street	
City, State, Zip	Boston, MA, 02110	
Phone	(617) 555-5555	
Email	jharris@abcconstruction.com	

Builders Inc Information:

	Primary Sales Contact
Contact Name	Miranda Smith
Phone	(615) 555-5555
Email	msmith@buildersinc.com
Legal Notices	
Legal Notice Email	

These STANDARD TERMS AND CONDITIONS ("Standard Terms") of the Master Services Agreement by and between Builders Inc ("Builders Inc") and ABC Construction ("Customer"). Is made effective as of 1/1/2025 ("Effective Date"). "Customer" may include Customer's Affiliates approved by ABC Construction to receive "Services" (as defined below) under these Standard Terms. The agreement between the parties consists of the attached Standard Terms and Conditions and all service orders ("Service Orders") attached hereto or subsequently signed by the parties (collectively, the "Agreement"). In the event of a conflict between the Standard Terms and any Service Order(s), the Service Order(s) shall take precedence.

The Agreement shall continue in effect until the completion of project taking place at Greenwood Park, 1234 Elmwood Drive, Nashville, TN 37210 (Project #: 1592), unless earlier terminated in accordance with the provisions of the Agreement. The term of each Service Order is stated in the applicable Service Order.

SIGNATURE BELOW BY YOUR AUTHORIZED REPRESENTATIVE IS YOUR CONSENT TO THE STANDARD TERMS AND CONDITIONS OF THE AGREEMENT WHICH ARE ATTACHED HERETO

Insurance

Displays a breakdown of the insurance requirements extracted from the uploaded contract.

Certificate Editor

INSURANCE

Indicates some coverages are not compliant

- Builders Risk REMOVE LOB
- Automobile Liability REMOVE LOB
- Professional Liability / Errors & Omissions REMOVE LOB
- General Liability REMOVE LOB
- Worker's Compensation REMOVE LOB
- Umbrella/Excess Liability REMOVE LOB

+ LINE OF BUSINESS

Certificate

Displays the ACORD Form selected with applicable lines of business and coverages populated, with a real time preview of updates made while processing the certificate.

Certificate Editor

CERTIFICATE ✕

ENDORSEMENTS 0 endorsements attached

106% ⊖ ⊕

ACORD **CERTIFICATE OF LIABILITY INSURANCE** DATE (MM/DD/YYYY) 3/7/2025

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

INSURED
Builders Inc.
529 Woodland St
South Glastonbury, CT 06073

INSURER(S) AFFORDING COVERAGE

INSURER #	INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A	USLI Investment Corporation	21518
INSURER B	Fireman's Fund Insurance Company	21872
INSURER C	Security National Insurance Co	33123
INSURER D	Travelers Insurance Company	36137
INSURER E		
INSURER F		

COVERAGES **CERTIFICATE NUMBER:** 14958 **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	INSURANCE	POLICY NUMBER	POLICY EFF. DATE (MM/DD/YYYY)	POLICY EXPI. DATE (MM/DD/YYYY)	LIMITS
A	COMMERCIAL GENERAL LIABILITY	<input checked="" type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR	GL9120	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 1,000,000
		GENERAL AGGREGATE LIMIT APPLIES PER: POLICY <input type="checkbox"/> PER-JECT <input checked="" type="checkbox"/> LOC <input type="checkbox"/> OTHERS				DAMAGE TO RENTED PREMISES (Per occurrence) \$ 50,000
B	AUTOMOBILE LIABILITY	<input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIREN AUTOS ONLY	CAU9120	09-01-2020	09-01-2021	MED EXP (Any one person) \$ 10,000
		<input type="checkbox"/> SCHEDULED AUTOS				PERSONAL & ADJ INJURY \$ 1,000,000
C	UMBRELLA LIABILITY	<input checked="" type="checkbox"/> EXCESS LIABILITY <input checked="" type="checkbox"/> CLAIMS-MADE	EXCESS9120	09-01-2024	09-01-2025	GENERAL AGGREGATE \$ 2,000,000
		<input type="checkbox"/> RETENTION				PRODUCTS - COMP/OP AGG \$ 2,000,000
D	WORKERS COMPENSATION AND EMPLOYERS LIABILITY (AN EMPLOYEE OR PARTNER/EXECUTIVE OFFICER/OWNER EXCLUDED?)	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	WC9135	09-01-2020	09-01-2021	COMBINED SINGLE LIMIT (Per accident) \$ 1,000,000
		<input type="checkbox"/> RETENTION				BODILY INJURY (Per person) \$
E	WORKERS COMPENSATION AND EMPLOYERS LIABILITY (AN EMPLOYEE OR PARTNER/EXECUTIVE OFFICER/OWNER EXCLUDED?)	<input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	WC9135	09-01-2020	09-01-2021	PROPERTY DAMAGE (Per accident) \$
		<input type="checkbox"/> RETENTION				AGGREGATE \$ 5,000,000
F	WORKERS COMPENSATION AND EMPLOYERS LIABILITY (AN EMPLOYEE OR PARTNER/EXECUTIVE OFFICER/OWNER EXCLUDED?)	<input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	WC9135	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 5,000,000
		<input type="checkbox"/> RETENTION				AGGREGATE \$ 5,000,000
G	WORKERS COMPENSATION AND EMPLOYERS LIABILITY (AN EMPLOYEE OR PARTNER/EXECUTIVE OFFICER/OWNER EXCLUDED?)	<input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	WC9135	09-01-2020	09-01-2021	PROPERTY DAMAGE (Per accident) \$
		<input type="checkbox"/> RETENTION				EACH ACCIDENT \$ 1,000,000
H	WORKERS COMPENSATION AND EMPLOYERS LIABILITY (AN EMPLOYEE OR PARTNER/EXECUTIVE OFFICER/OWNER EXCLUDED?)	<input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	WC9135	09-01-2020	09-01-2021	AGGREGATE \$ 5,000,000
		<input type="checkbox"/> RETENTION				EACH OCCURRENCE \$ 5,000,000

Query

AI-powered chat, allowing a user to chat directly with the contract.

Certificate Editor

QUERY ✕

CERTIFICATE HERO

Start a conversation with the CH assistant by asking questions about the uploaded contract.

Ask a question... ➤

AI can make mistakes. Check important info.

ACORD Form Blue Selectors

Once you have selected the ACORD Form, within the certificate view, you will see in real time any additions and edits you make to a certificate. Anything with a **BLUE** selector is an area within the certificate you can interact with.

You can customize or modify your certificate of insurance by choosing any of the following blue selectors:

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



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
 3/4/2025

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 YOUR AGENCY HERE Address Line 1 Address Line 2 City, State Zip	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2">CONTACT NAME: John Smith</td> </tr> <tr> <td>PHONE (A/C No. Ext.): (555) 555-5555</td> <td>FAX (A/C No.): (555) 555-4444</td> </tr> <tr> <td colspan="2">E-MAIL ADDRESS: jsmith@certificatehero.com</td> </tr> <tr> <td colspan="2" style="text-align: center;">INSURER(S) AFFORDING COVERAGE</td> </tr> <tr><td>INSURER A:</td><td>NAIC #</td></tr> <tr><td>INSURER B:</td><td></td></tr> <tr><td>INSURER C:</td><td></td></tr> <tr><td>INSURER D:</td><td></td></tr> <tr><td>INSURER E:</td><td></td></tr> <tr><td>INSURER F:</td><td></td></tr> </table>	CONTACT NAME: John Smith		PHONE (A/C No. Ext.): (555) 555-5555	FAX (A/C No.): (555) 555-4444	E-MAIL ADDRESS: jsmith@certificatehero.com		INSURER(S) AFFORDING COVERAGE		INSURER A:	NAIC #	INSURER B:		INSURER C:		INSURER D:		INSURER E:		INSURER F:	
CONTACT NAME: John Smith																					
PHONE (A/C No. Ext.): (555) 555-5555	FAX (A/C No.): (555) 555-4444																				
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INSURER A:	NAIC #																				
INSURER B:																					
INSURER C:																					
INSURER D:																					
INSURER E:																					
INSURER F:																					

INSURED

 Builders Inc.
 529 Woodland St
 South Glastonbury, CT 06073

CERTIFICATE NUMBER: 14942 **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.

ROW	TYPE OF INSURANCE	AUG	SEPT	OCT	NOV	DEC	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 GEN'L 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 (Per occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPROP AGG \$
	AUTOMOBILE LIABILITY <input 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						Add Policy			COMBINED SINGLE LIMIT (Per 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 DEF 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						Add Policy			PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
							Add Policy			

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

 Select/Add Holder

CANCELLATION

 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 *Brad Blanton*

Contracts Window

Contract View

When a contract is uploaded, a copy of the contract will be available for reference within the **Contract** window.

From here, you can scroll through and review the contract you just uploaded, as well as confirm you have uploaded the correct one for the request you are working on.

CONTRACT ▼ ✕

CLEAR HIGHLIGHTING QUICK FINDS ▼

1 6 149% ▼ + ↓ ⋮

Master Services Agreement

Customer Information:

	Primary Business Contact	Primary Billing Contact
Customer Legal Name	ABC Construction	John Harris
Contact Name	John Harris	
Street Address	2345 Beacon Street	
City, State, Zip	Boston, MA. 02110	
Phone	(617) 555-5555	
Email	jharris@abccnsstruction.com	

Builders Inc Information:

	Primary Sales Contact
Contact Name	Miranda Smith
Phone	(615) 555-5555
Email	msmith@buildersinc.com
Legal Notices	
Legal Notice Email	

These STANDARD TERMS AND CONDITIONS ("**Standard Terms**") of the Master Services Agreement by and between Builders Inc ("**Builders Inc**") and ABC Construction ("**Customer**"). Is made effective as of 1/1/2025 ("**Effective Date**"). "Customer" may include Customer's Affiliates approved by ABC Construction to receive "Services" (as defined below) under these Standard Terms. The agreement between the parties consists of the attached Standard Terms and Conditions and all service orders ("**Service Orders**") attached hereto or subsequently signed by the parties (collectively, the "**Agreement**"). In the event of a conflict between the Standard Terms and any Service Order(s), the Service Order(s) shall take precedence.

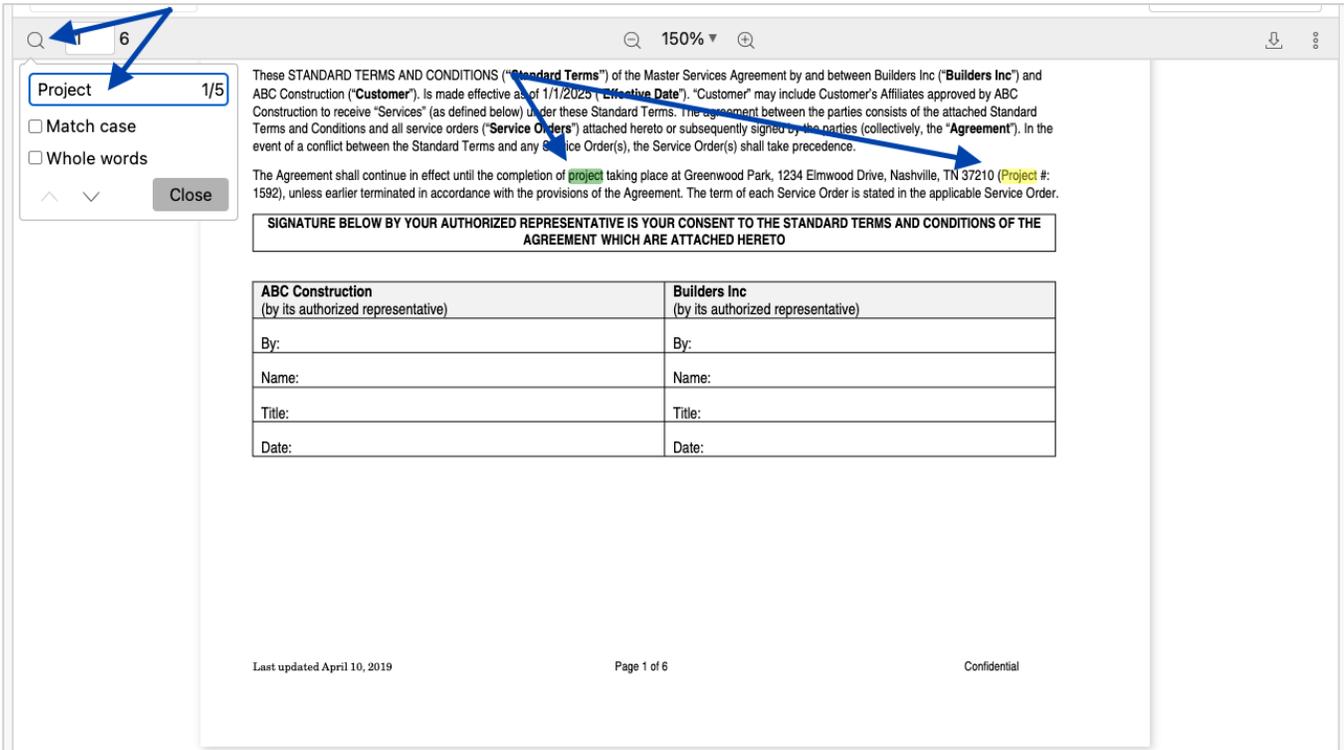
The Agreement shall continue in effect until the completion of project taking place at Greenwood Park, 1234 Elmwood Drive, Nashville, TN 37210 (Project #: 1592), unless earlier terminated in accordance with the provisions of the Agreement. The term of each Service Order is stated in the applicable Service Order.

SIGNATURE BELOW BY YOUR AUTHORIZED REPRESENTATIVE IS YOUR CONSENT TO THE STANDARD TERMS AND CONDITIONS OF THE AGREEMENT WHICH ARE ATTACHED HERETO

Contract Search

When you select to view the Contract, you are provided the ability to search within the contract. With this feature, even unstructured PDFs are now searchable, allowing you to quickly find specific information in your uploaded document.

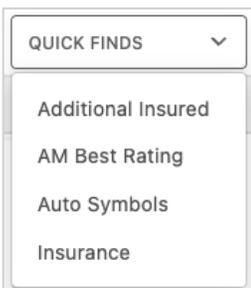
To use this feature, click the search icon in the upper left corner of the Contract window. Enter a word or phrase in the search box, and the system will highlight all instances in yellow, making it easy to locate across pages.



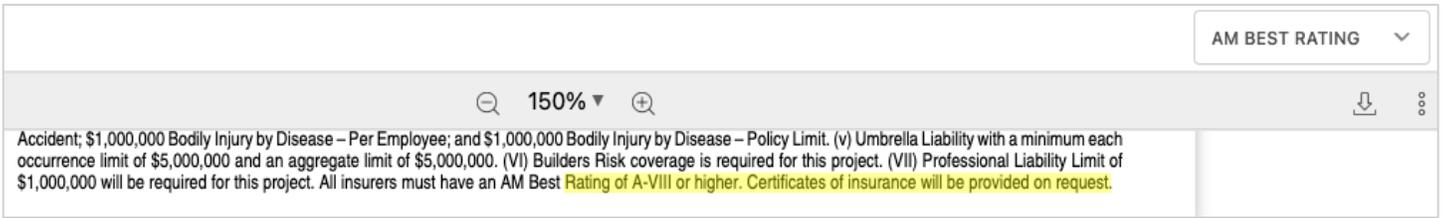
Contract Quick Finds

Also within the Contract view, you are provided an easy to use Quick Finds dropdown. These Quick Finds are Pre-found AI concepts, allowing you to quickly jump to commonly required criteria, for example: Additional Insured status, or the AM Best Rating.

When you select one of the quick finds options from the dropdown, you will be directed to that section of the contract, with the requirement highlighted yellow.



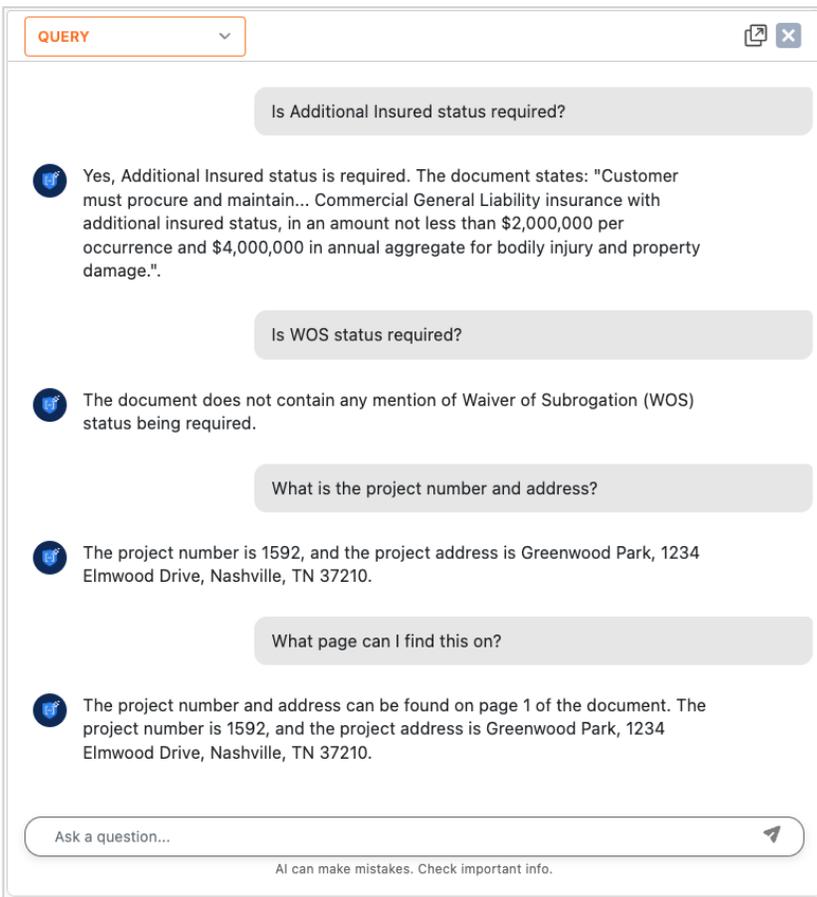
The image below is an example of a user selecting AM Best Rating from the Quick Finds dropdown, with the contract view updated to show the rating within the contract, highlighted yellow for easy reference.



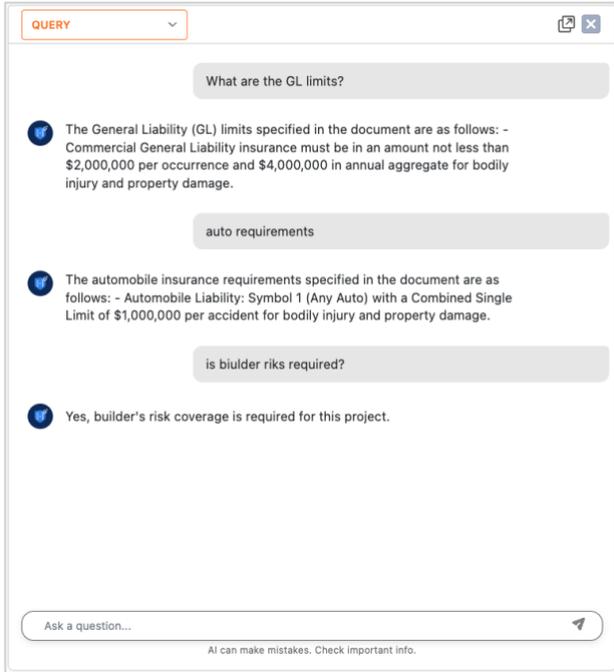
Contract Query

Within the Query view, you can “chat” with the contract. Simply ask a question, and the system will extract relevant information for you. Your queries can cover both insurance and non-insurance topics—if the information is in the contract, this feature can find it.

The image below shows an example of a chat conversation with a contract. In this example, the user inquires about the Additional Insured status, the Waiver of Subrogation status and the project information.



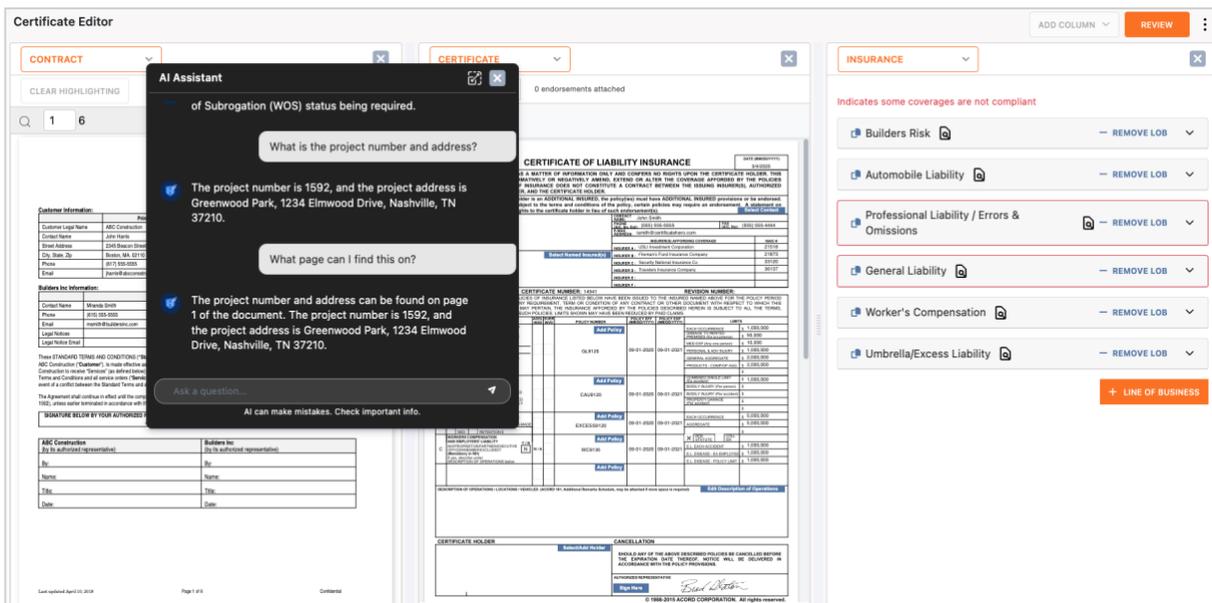
Certificate Hero's AI behind the chat feature is intuitive enough to recognize common abbreviations (e.g., GL for General Liability and WOS for Waiver of Subrogation), understand variations in formatting (such as full questions versus brief phrases), and accurately respond to misspellings.



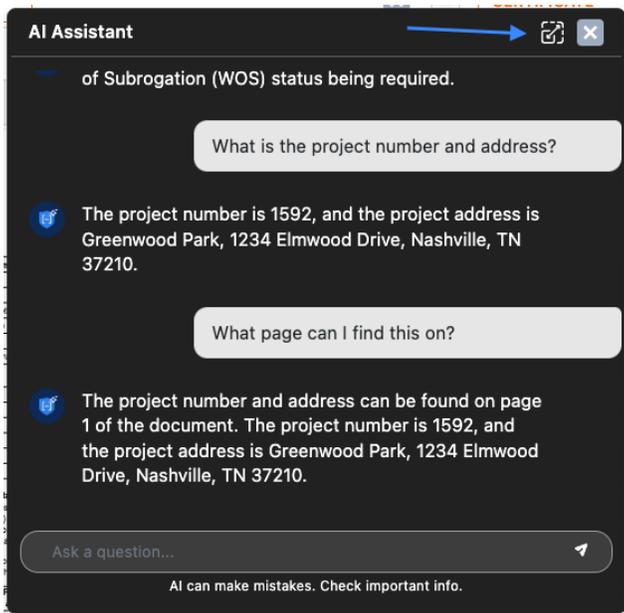
The Query window can also pop-out from the window it begins in. In the upper right corner, click the icon to pop-out the chat box.



Once the chat box modal appears, you can move it around the screen.



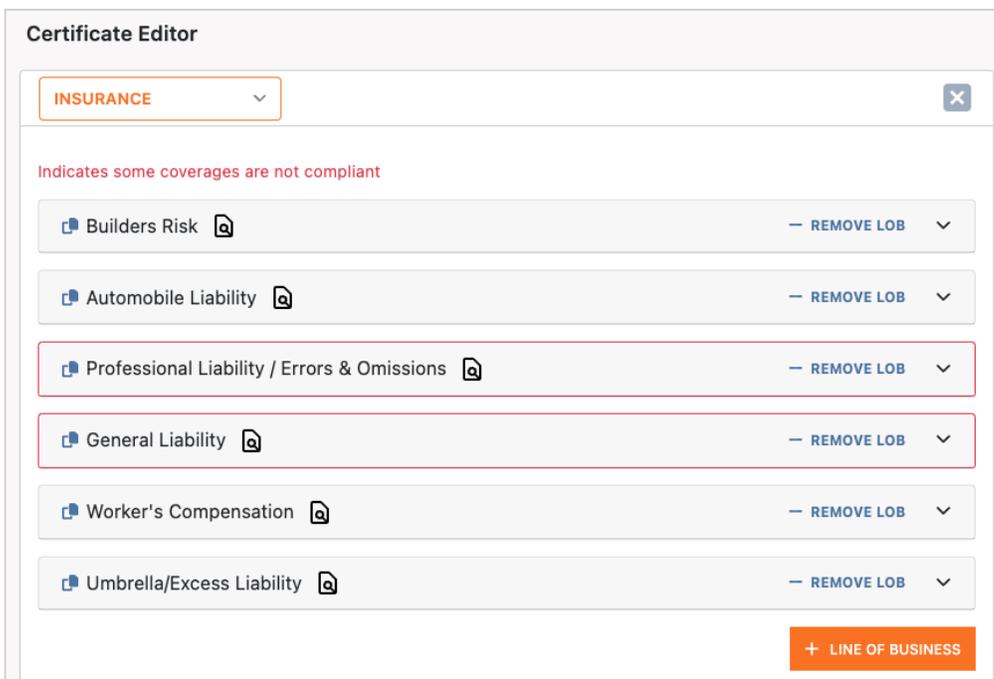
You can either click the X in the upper right corner to close the chat box or click the icon to collapse the modal back into your view.



Insurance Requirements Window

When a contract is uploaded, it is run through the Certificate Hero software. Through this, the insurance requirements of that contract are isolated and extracted. Certificate Hero will then break down the insurance requirements of the contract by line of business. And then within each line of business, breaks it down further by each coverage that's being required.

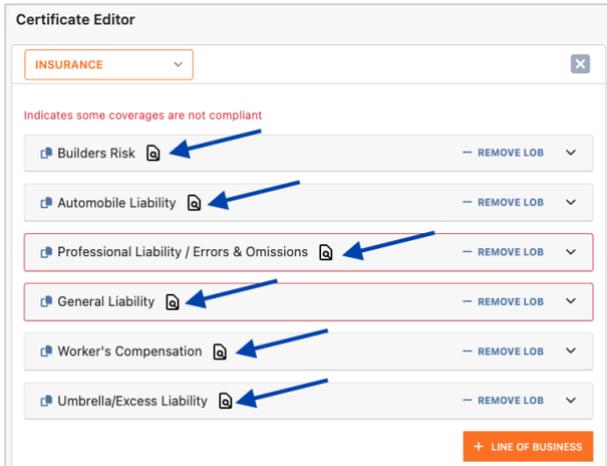
The details of the Insurance requirements will be displayed within the **Insurance** window.



Line of Business Quick Finds

Within the Insurance view, to the right of the Line of Business you'll find the policy quick find icon. Clicking the icon will jump you to the appropriate section of the contract.

If you do not already have a view of the Contract window open, one will open for you once you've clicked this icon.



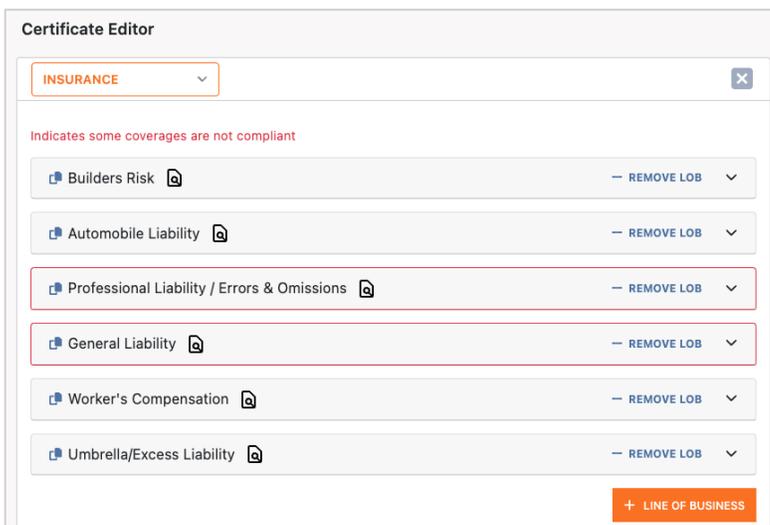
The image below is an example of a user that has clicked the policy quick find icon for the Automobile Liability policy. To the left of the Line of Business requirement, you can see the verbiage highlighted within the contract.



This view will also display any compliant and/or non-compliant policies.

Compliant and Non-compliant Coverages

You can expand each LOB to review the coverage requirements extracted from the uploaded contract.



Requirements – Compliant Line of Business (LOB)

A *compliant* LOB, the LOB will *not* have a highlighted red boarder. Without a red boarder, it means the policy and coverages meet the insurance requirements found in the contract.

To verify compliance, expand the LOB, and compare the "Contract" column (insurance requirement from the contract) and "Coverage" column (the coverage the Insured actually carries according to AMS integration) to determine where the insured *is* compliant.

If the coverages match, the "Compliant" column should be marked as *YES*.

Certificate Editor

INSURANCE ✕

Indicates some coverages are not compliant

Builders Risk 📄 — REMOVE LOB ▼

Automobile Liability 📄 — REMOVE LOB ▲

Automobile liability: symbol 1 (any auto) with a combined single limit of \$1,000,000 per accident for bodily injury and property damage; [Show Less](#)

REQUIREMENT	CONTRACT	COVERAGE	COMPLIANT	ACTIONS
Combined Single Limit 📄	\$1,000,000	\$1,000,000	YES	...
Symbol 1 - Any Auto	SPECIFIED	SPECIFIED	YES	...

[ADD COVERAGE](#)

Requirements – Non-Compliant Line of Business (LOB)

A *non-compliant* LOB will be easily identifiable by a highlighted **red border**.

To view what is not complaint, expand the LOB and a **red message** in the "Compliant" column should be marked *NO* to identify which coverage(s) within the policy is not compliant with the contract you uploaded.

You can then compare the "Contract" column and "Coverage" column to determine the areas in which the Insured's policy is not compliant.

The screenshot shows the 'Certificate Editor' interface. At the top, there is a dropdown menu set to 'INSURANCE'. Below it, a red-bordered box indicates 'Indicates some coverages are not compliant'. Inside this box, the 'General Liability' LOB is expanded. A description of the LOB is provided: 'Commercial general liability insurance with additional insured status, in an amount not less than \$2,000,000 per occurrence and \$4,000,000 in annual aggregate for bodily injury and property damage. [Show Less](#)'. Below the description is a table with the following data:

REQUIREMENT	CONTRACT	COVERAGE	COMPLIANT	ACTIONS
Each Occurrence Limit	\$2,000,000	\$1,000,000	NO	...
General Aggregate Limit	\$4,000,000	\$2,000,000	NO	...
Additional Insured	SPECIFIED	SPECIFIED	YES	...

At the bottom of the table, there is an 'ADD COVERAGE' button. Blue arrows in the original image point to the 'Indicates some coverages are not compliant' message, the 'General Liability' header, and the 'NO' values in the 'COMPLIANT' column.

If the Insured *does not* carry a required LOB, this is considered a non-compliant LOB as well. This LOB will also be identifiable by a highlighted **red border**.

When you expand to view how the LOB is not complaint, the "Coverage" column should read "No Coverage".

The screenshot shows the 'Certificate Editor' interface. At the top, there is a dropdown menu set to 'INSURANCE'. Below it, a red-bordered box indicates 'Indicates some coverages are not compliant'. Inside this box, the 'Professional Liability / Errors & Omissions' LOB is expanded. A description of the LOB is provided: 'Professional liability limit of \$1,000,000 will be required for this project.' Below the description is a table with the following data:

REQUIREMENT	CONTRACT	COVERAGE	COMPLIANT	ACTIONS
Each Occurrence Limit	\$1,000,000	NO COVERAGE	NO	...

At the bottom of the table, there is an 'ADD COVERAGE' button. Blue arrows in the original image point to the 'NO COVERAGE' and 'NO' values in the 'COVERAGE' and 'COMPLIANT' columns respectively.

Updating the Agency Contact

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

such endorsement(s).		Select Contact
CONTACT NAME:	John Smith	
PHONE (A/C, No, Ext):	(555) 555-5555	FAX (A/C, No): (555) 555-4444
E-MAIL ADDRESS:	jsmith@certificatehero.com	

Selecting an Existing Agency Contact

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

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

The screenshot shows a modal window titled "Edit Contact" with a close button (X) in the top right corner. Below the title, there is a "CONTACT" label and two buttons: "EDIT EXISTING" (with a pencil icon) and "+ ADD NEW". A search input field contains the text "Choose a contact...". Below the input field, a dropdown menu is open, listing three contact names: "John Smith (Default)", "Robert Johns", and "Nicole Vandgrift".

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

The screenshot shows the same "Edit Contact" modal window. The search input field now contains the text "Robert Johns". Below the input field, a dropdown menu is open, showing a single search result: "Robert Johns".

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

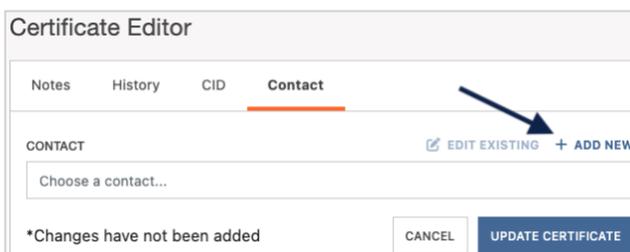
E-MAIL

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 certificate.

Certificate Editor

Notes History CID **Contact**

CONTACT

Agency Contact

*Changes have not been added

The Agency Contact on the certificate 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		

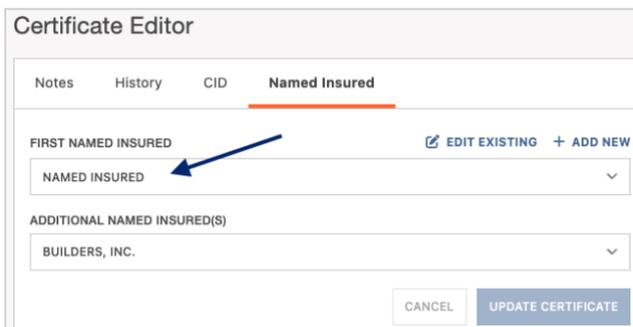
Updating the Named Insured

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

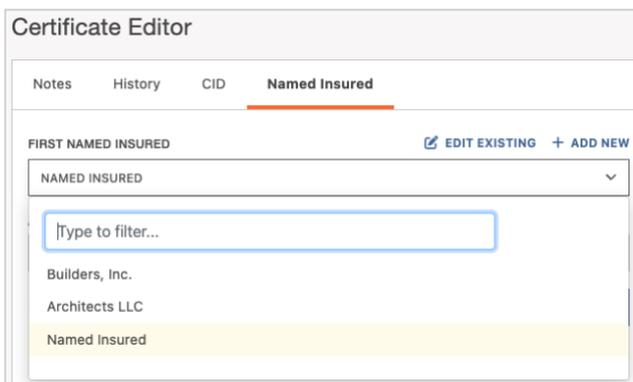


Selecting an Existing Named Insured

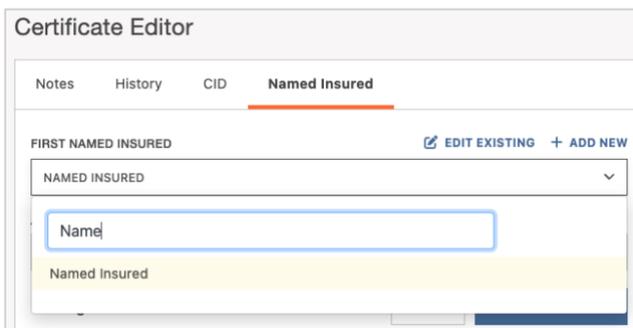
To select an existing Named Insured, click the First Named Insured.



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



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



You can also add Additional Named Insured(s) to be reflected on the certificate.

Click on the “Additional Named Insured(s)” dropdown and selected the additional Named Insured(s) you’d like shown.

Certificate Editor

Notes History CID **Named Insured**

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

NAMED INSURED

ADDITIONAL NAMED INSURED(S)

BUILDERS, INC.

Type to filter...

Builders, Inc.

Architects LLC

Edit an Existing Named Insured

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

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](#)

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 ZIP CODE

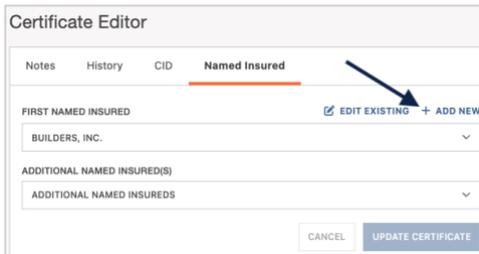
CA 90210

[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**

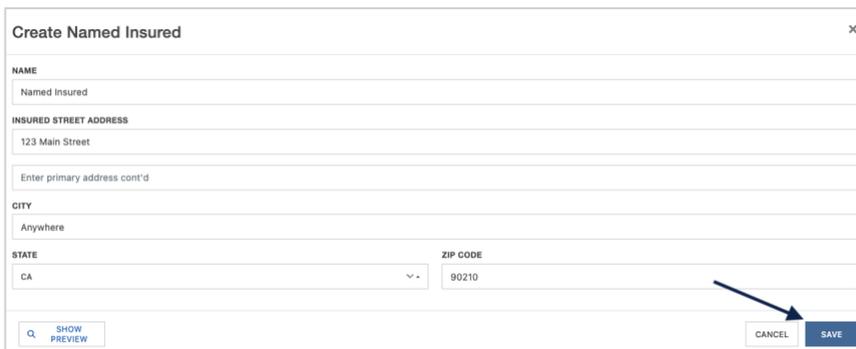
FIRST NAMED INSURED [EDIT EXISTING](#) [+ ADD NEW](#)

BUILDERS, INC.

ADDITIONAL NAMED INSURED(S)

ADDITIONAL NAMED INSUREDS

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



Create Named Insured

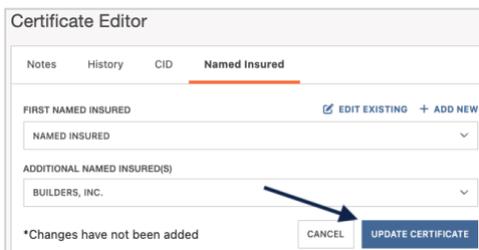
NAME
Named Insured

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

CITY
Anywhere

STATE CA ZIP CODE 90210

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



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

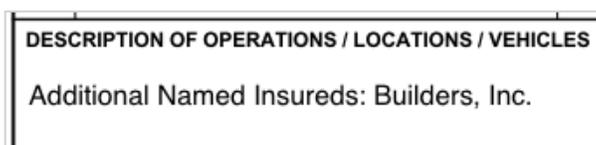
The First Named Insured on the certificate has been updated:



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.

Updating the Policies

Within the Policies section of the certificate, click “Add Policy” for the policy you want to add to the certificate.

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 within the certificate editor. On the far left of this section you can switch through various LOBs to add to the certificate. You can also select existing LOB profiles or add new LOBs profiles.

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

ADD LOB

CHOOSE PROFILE

NO PROFILE

EDIT EXISTING + ADD NEW

POLICY NUMBER

POLICY NAME

EFFECTIVE DATE

EXPIRATION DATE

DESCRIPTION

COMMERCIAL GENERAL LIABILITY

CLAIMS-MADE BASIS

COVERAGE A

COVERAGE B

PER POLICY

PER PROJECT

PER LOCATION

PER OTHER

Certificate Only Field

ADDITIONAL INSURED

Certificate Only Field

WAIVER OF SUBROGATION

EACH OCCURRENCE LIMIT

DAMAGE TO RENTED PREMISES LIMIT

MEDICAL EXPENSE

PERSONAL & ADVERTISING LIMIT

GENERAL AGGREGATE LIMIT

PRODUCTS - COMP/OP AGGREGATE LIMIT

Value

Value

Value

Value

Value

Value

Coverage Name

Value

CANCEL

SAVE

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 LOB Profiles Manager.

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

Certificate Only Field
 ADDITIONAL INSURED

Certificate Only Field
 WAIVER OF SUBROGATION

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: 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

CANCEL SAVE

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

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

ADD LOB

CHOOSE PROFILE

NO PROFILE

No Profile

2020 CAU (Default) - 20-21 Auto Liability

HIDE EXPIRED

Line of Business

General Liability

Automotive

Umbrella

Workers Comp

ADD LOB

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

ADD LOB

CHOOSE PROFILE

NO PROFILE

No Profile

2020 WC (Default) - 20-21 WC OOS (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.



Editing an Existing Policy LOB

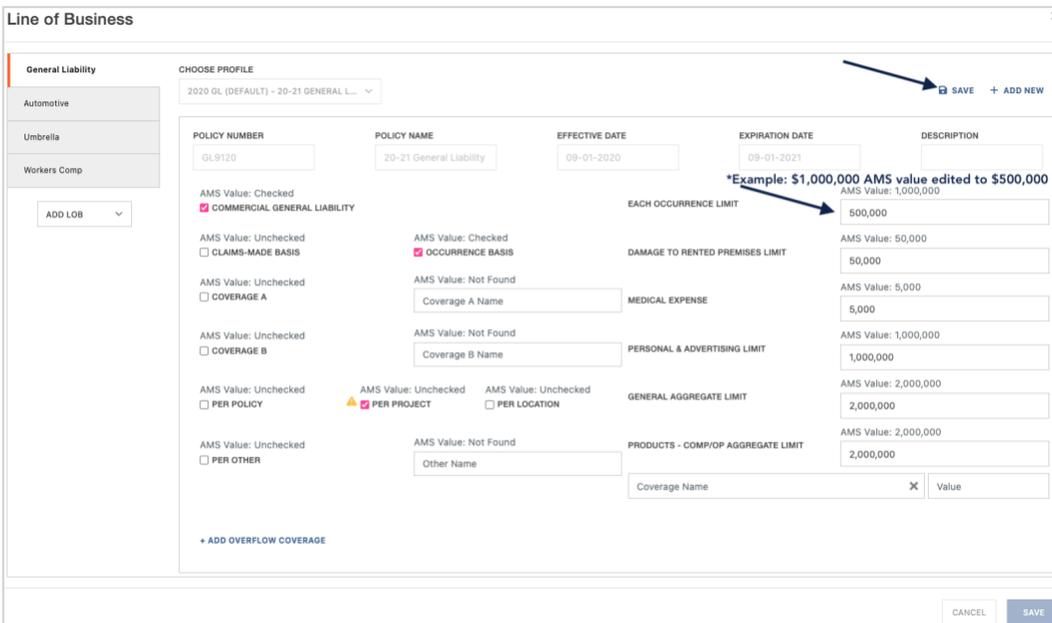
Please Note: While you are *unable to increase the limits* pulled from your AMS to show on the certificate, you *can update to show a lower limit*.

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 Certificate Manager will *update not just the certificate*, but the LOB Profile in your LOB Manager menu as well.



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

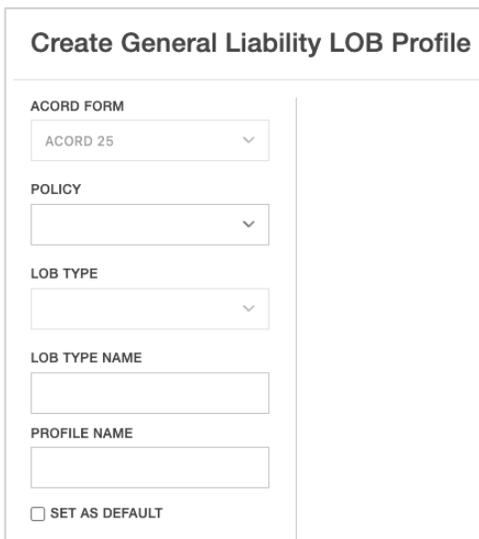
Don't see the policy you want to show on the certificate? Add a new LOB while issuing a certificate by clicking "Add New".



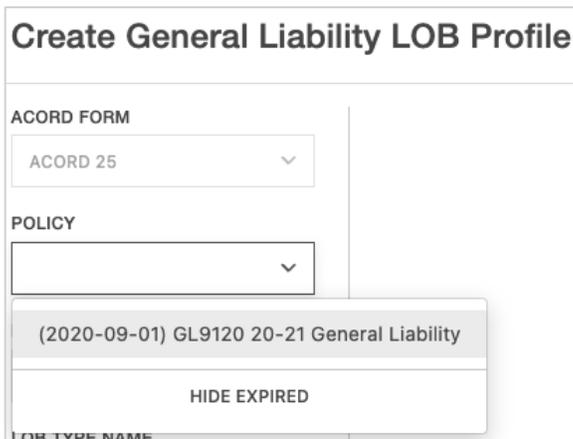
This will allow you to create a new LOB Profile right from within the certificate editor, without having to leave your certificate and entering the policies.

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.



Select the desired policy from the Policy drop down.



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: 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

Review and confirm the data pulled from the AMS.

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: 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 PROJECT

AMS Value: Unchecked
 PER LOCATION

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: Not Found
Other Name

EACH OCCURRENCE LIMIT
AMS Value: 1,000,000
1,000,000

DAMAGE TO RENTED PREMISES LIMIT
AMS Value: 50,000
50,000

MEDICAL EXPENSE
AMS Value: 5,000
5,000

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

GENERAL AGGREGATE LIMIT
AMS Value: 2,000,000
2,000,000

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

Coverage Name X Value

+ ADD OVERFLOW COVERAGE

SAVE

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

CANCEL SAVE

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: Unchecked
 COVERAGE A

AMS Value: Unchecked
 COVERAGE B

AMS Value: Unchecked
 PER POLICY

AMS Value: Unchecked
 PER OTHER

AMS Value: Checked
 ADDITIONAL INSURED

Certificate Only Field

AMS Value: Checked
 WAIVER OF SUBROGATION

Certificate Only Field

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

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

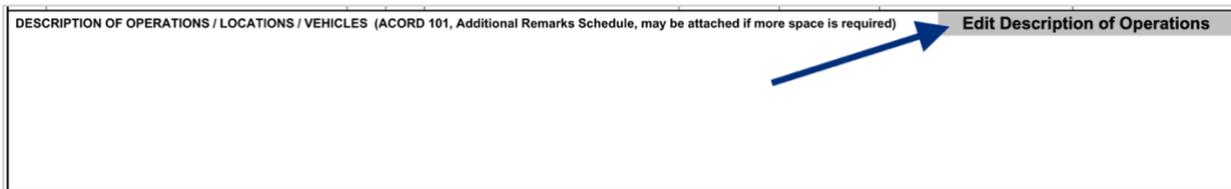
Coverage Name: Value:

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

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"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Add Policy GL9120	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"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY			Add Policy CAU9120	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"/> EXCESS LIAB <input type="checkbox"/> OCCUR <input checked="" type="checkbox"/> CLAIMS-MADE DED: <input type="text"/> RETENTION \$: <input type="text"/>			Add Policy EXCESS9120	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			Add Policy OOSWC9120	09-01-2020	09-01-2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

Updating the Description of Operations

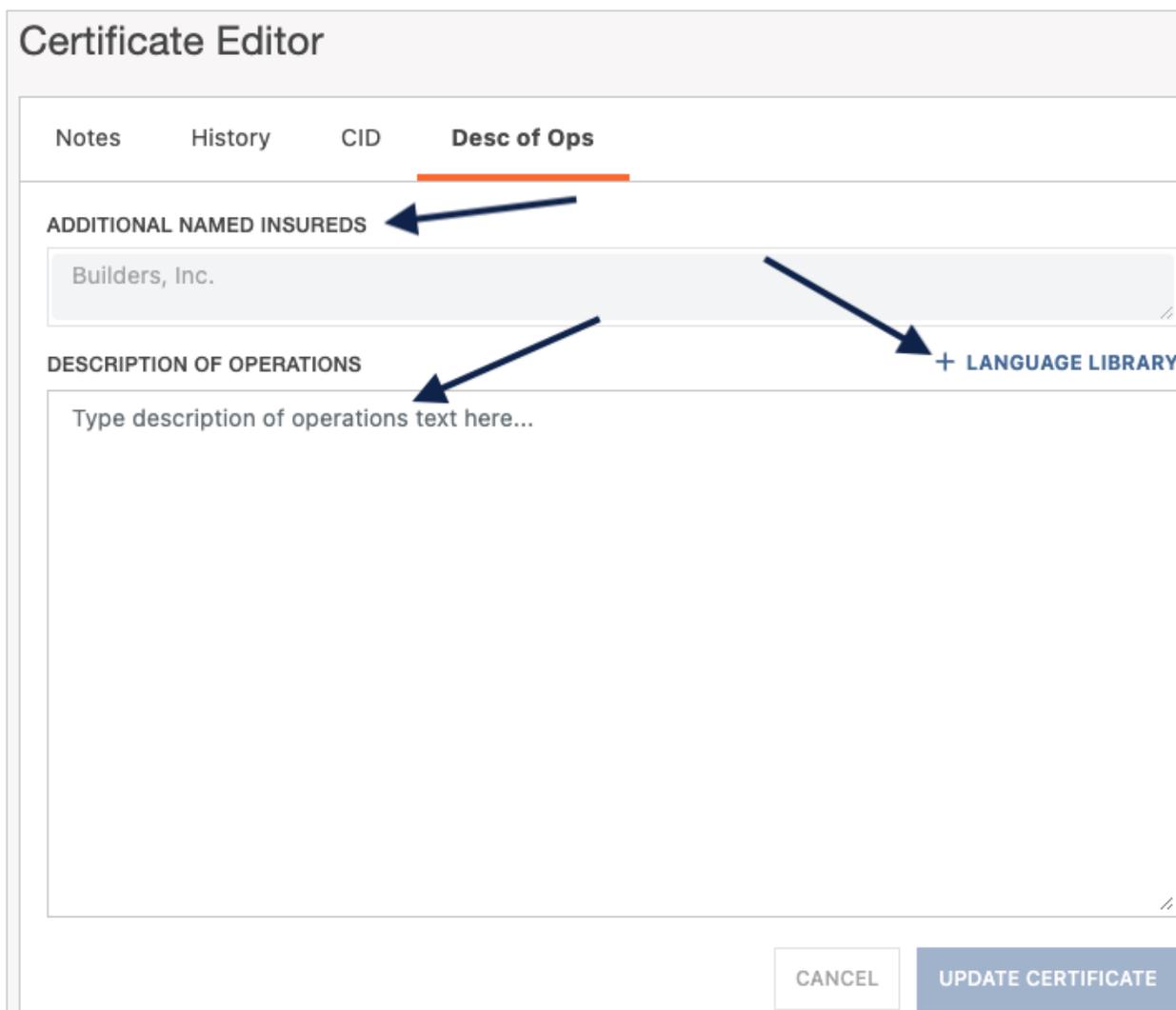
To add verbiage to your Description of Operations (DOO), click “Edit Description of Operations”.



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



Language Library

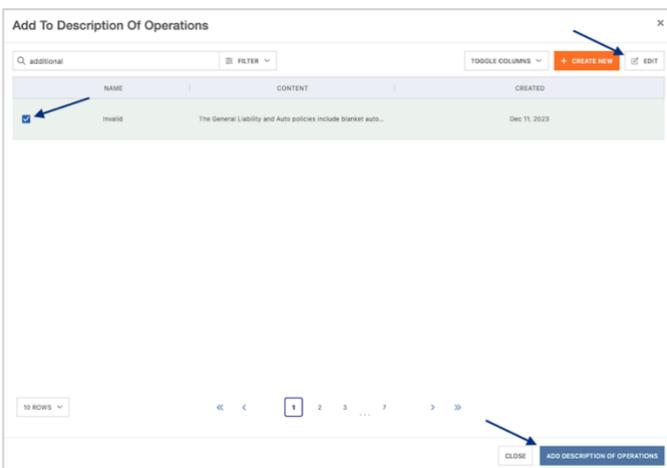
To view your verbiage templates, click “Language Library”.



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

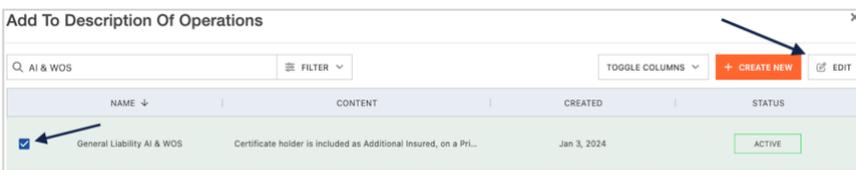
Once you found the language you want to add, check the box on the far left.

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

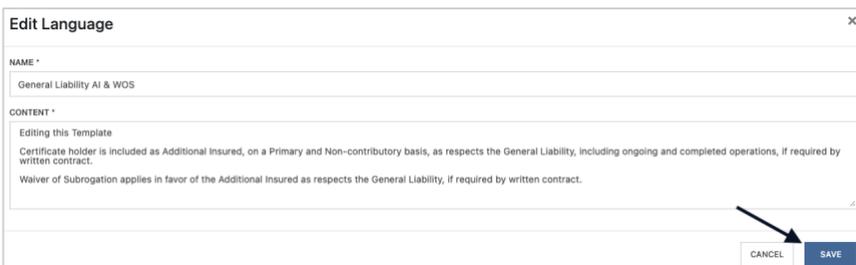


Editing Language Library Template

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



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



Create a New Language Library Template

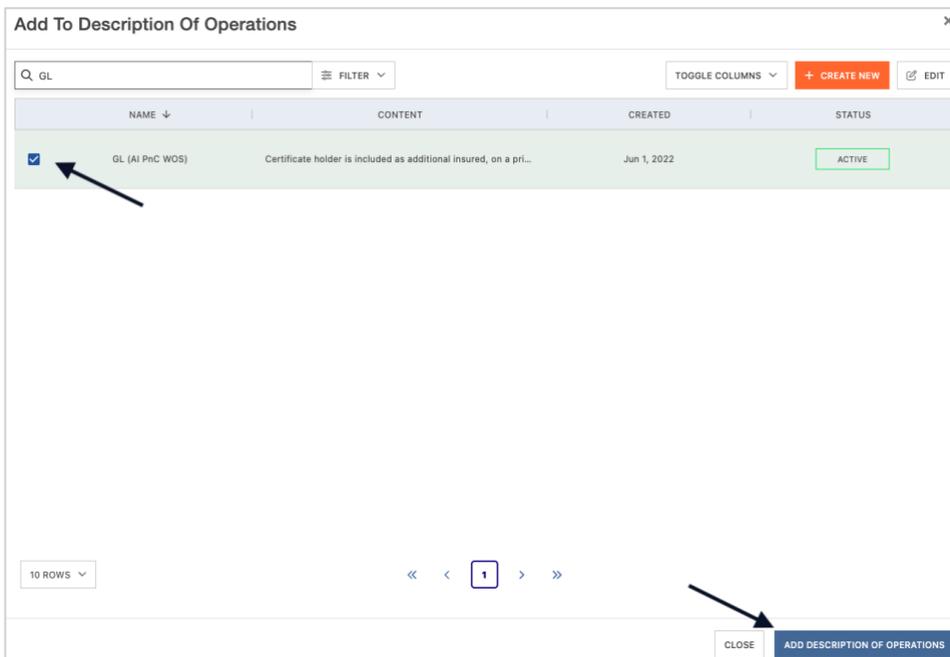
To create a new Language Library template, click “Create New”.



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

The screenshot shows a "Create Language" form. It has two main sections: "NAME" and "CONTENT". The "NAME" field contains "General Liability AI & WOS". The "CONTENT" field contains two lines of text: "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." and "Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract." At the bottom right are "CANCEL" and "SAVE" buttons. An arrow points to the "SAVE" button.

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



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



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 INSURED
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, click “Update Certificate” to reflect the change to the certificate.

Certificate Editor

Notes History CID **Desc of Ops**

ADDITIONAL NAMED INSURED
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 on the certificate 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 certificate has overflowed to the additional remarks schedule of the certificate, also known as the Certificate Hero 101:

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

Updating the Certificate Holder

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

CERTIFICATE HOLDER
Select/Add Holder

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

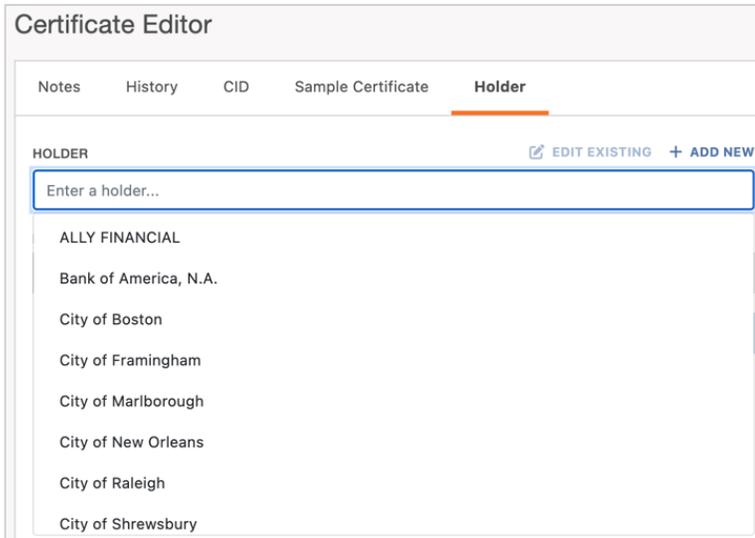
Certificate Editor			
Notes	History	CID	Holder
HOLDER	<input type="text" value="Enter a holder..."/>		EDIT EXISTING + ADD NEW
HOLDER ADDRESS	<input type="text" value="CHOOSE HOLDER ADDRESS"/>		
		CANCEL	UPDATE CERTIFICATE

Selecting an Existing Holder

To select an existing Holder, click the Holder name.

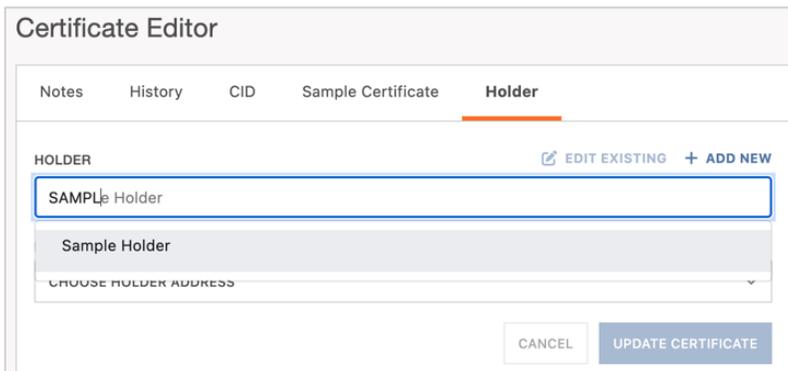
Certificate Editor				
Notes	History	CID	Sample Certificate	Holder
HOLDER	<input type="text" value="Sample Holder"/>		EDIT EXISTING + ADD NEW	
HOLDER ADDRESS	<input type="text" value="123 MAIN STREET MIAMI, FL 33133"/>			
*Changes have not been added		CANCEL	UPDATE CERTIFICATE	

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



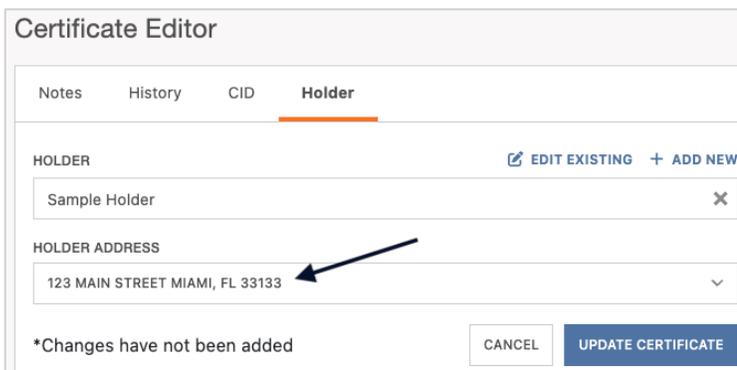
The screenshot shows the 'Certificate Editor' interface with the 'Holder' tab selected. A search input field contains the text 'Enter a holder...'. Below the input field is a scrollable list of existing holders: ALLY FINANCIAL, Bank of America, N.A., City of Boston, City of Framingham, City of Marlborough, City of New Orleans, City of Raleigh, and City of Shrewsbury. At the top right of the holder list area, there are links for 'EDIT EXISTING' and '+ ADD NEW'.

...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 search input field now contains the text 'SAMPLE Holder'. Below the input field, a dropdown menu is open, showing 'Sample Holder' as the selected option. Below the dropdown is a label 'CHOOSE HOLDER ADDRESS' with a dropdown arrow. At the bottom of the interface, there are two buttons: 'CANCEL' and 'UPDATE CERTIFICATE'.

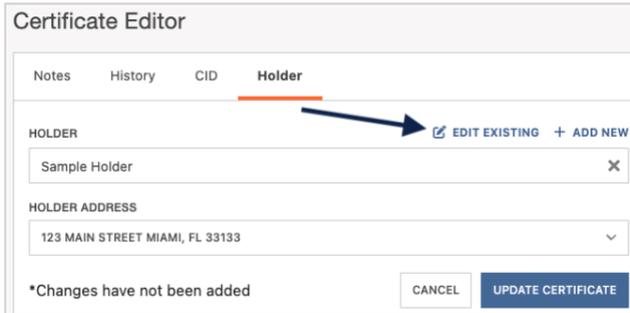
Once you have selected the Holder, you can select one of the addresses already on file for that Holder, or to forego showing an address.



The screenshot shows the 'Certificate Editor' interface with the 'Holder' tab selected. The search input field contains 'Sample Holder'. Below it, the 'HOLDER ADDRESS' dropdown menu is open, showing the selected address '123 MAIN STREET MIAMI, FL 33133'. A black arrow points to this address. At the bottom left, there is a message '*Changes have not been added'. At the bottom right, there are two buttons: 'CANCEL' and 'UPDATE CERTIFICATE'.

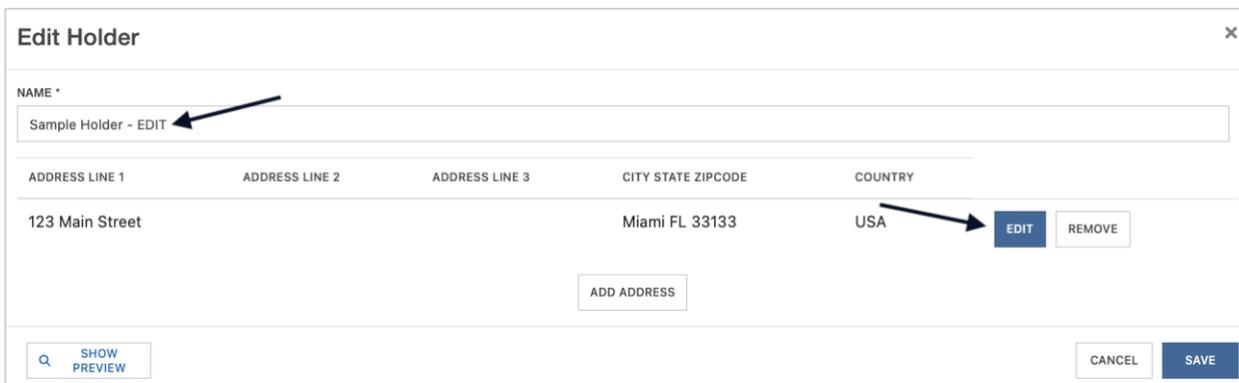
Edit an Existing Holder

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



The Certificate Editor interface has tabs for Notes, History, CID, and Holder. The Holder tab is selected and highlighted with a red underline. A blue arrow points from the Holder tab to the 'EDIT EXISTING' button. The Holder name is 'Sample Holder' and the address is '123 MAIN STREET MIAMI, FL 33133'. At the bottom, there are 'CANCEL' and 'UPDATE CERTIFICATE' buttons. A status message reads '*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”.



The Edit Holder form has a 'NAME' field containing 'Sample Holder - EDIT' with a blue arrow pointing to it. Below are fields for ADDRESS LINE 1 (123 Main Street), ADDRESS LINE 2, ADDRESS LINE 3, CITY STATE ZIPCODE (Miami FL 33133), and COUNTRY (USA). A blue arrow points to the 'EDIT' button next to the country field. There is also a 'REMOVE' button. At the bottom, there is an 'ADD ADDRESS' button, a 'SHOW PREVIEW' button, and 'CANCEL' and 'SAVE' buttons.

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



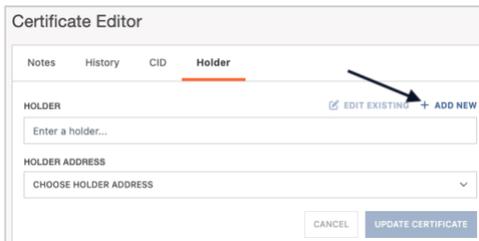
The Edit Holder Address form has a 'NAME' field containing 'Sample Holder - EDIT'. Below are fields for ADDRESS LINE 1 (123 Main Street), ADDRESS LINE 2 (Suite 456, with a blue arrow pointing to it), ADDRESS LINE 3, CITY (Miami), COUNTRY (USA), STATE (FL), and POSTAL CODE (33133). At the bottom, there is a 'SHOW PREVIEW' button, a 'CANCEL' button, and an 'UPDATE ADDRESS' button with a blue arrow pointing to it.

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



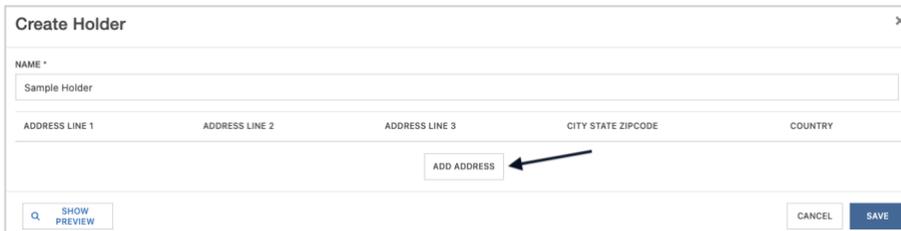
Add a New Holder

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

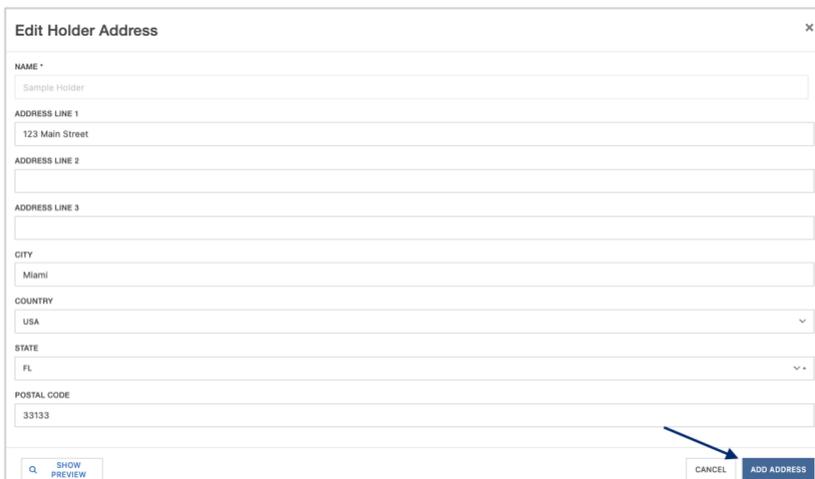


Enter the new Holder name.

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



Fill out the address form and click “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 certificate.

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 certificate has been updated:

CERTIFICATE HOLDER

[Select/Add Holder](#)

Sample Holder
123 Main Street
Miami, FL 33133

Updating the Signature

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



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

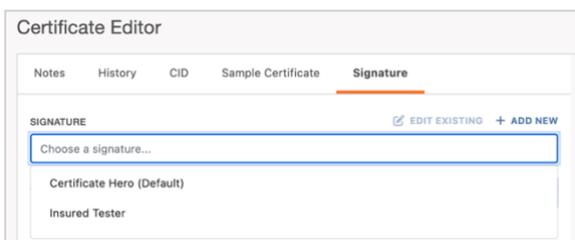


Selecting an Existing Signature

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.



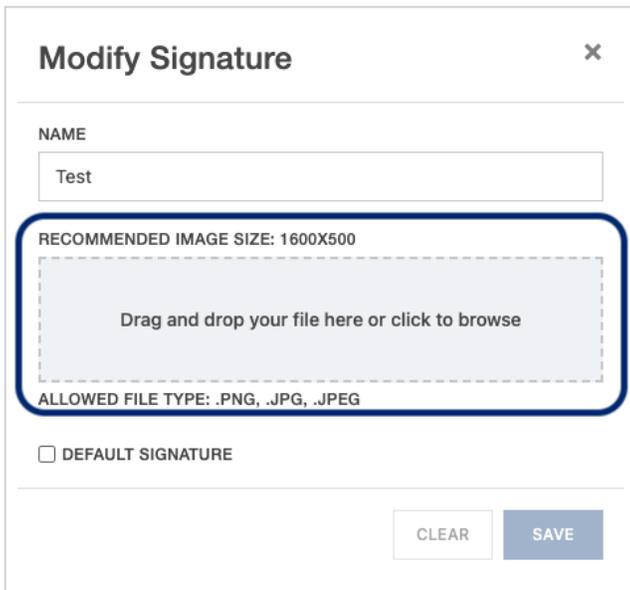
Edit an Existing Signature

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



The Certificate Editor interface has tabs for Notes, History, CID, and Signature. The Signature tab is active. Below the tabs, there is a 'SIGNATURE' section with a search box containing 'Test NV' and a close button. To the right of the search box are two buttons: 'EDIT EXISTING' (with a pencil icon) and '+ ADD NEW'. A blue arrow points from the 'EDIT EXISTING' button to the right. At the bottom, there is a status message '*Changes have not been added' and two buttons: 'CANCEL' and 'UPDATE CERTIFICATE'.

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



The 'Modify Signature' dialog box has a close button in the top right. It contains a 'NAME' field with the text 'Test'. Below this is a large dashed box for file upload, containing the text 'Drag and drop your file here or click to browse'. Above the dashed box, it says 'RECOMMENDED IMAGE SIZE: 1600X500'. Below the dashed box, it says 'ALLOWED FILE TYPE: .PNG, .JPG, .JPEG'. There is a checkbox labeled 'DEFAULT SIGNATURE' which is currently unchecked. At the bottom, there are two buttons: 'CLEAR' and 'SAVE'.

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



The 'Modify Signature' dialog box is shown with the signature preview. The 'NAME' field still contains 'Test'. The signature preview is a cursive word 'Signature'. Below the preview is the 'DEFAULT SIGNATURE' checkbox, which is unchecked. A blue arrow points from the 'DEFAULT SIGNATURE' checkbox area towards the 'SAVE' button. The 'CLEAR' and 'SAVE' buttons are at the bottom.

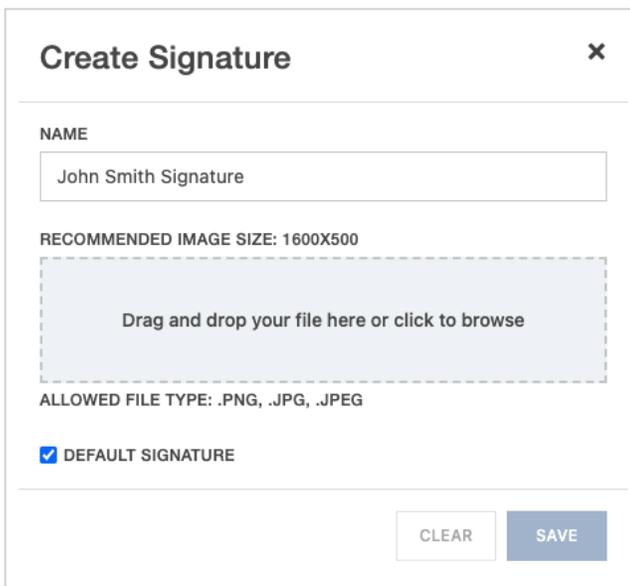
Adding a New Signature

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



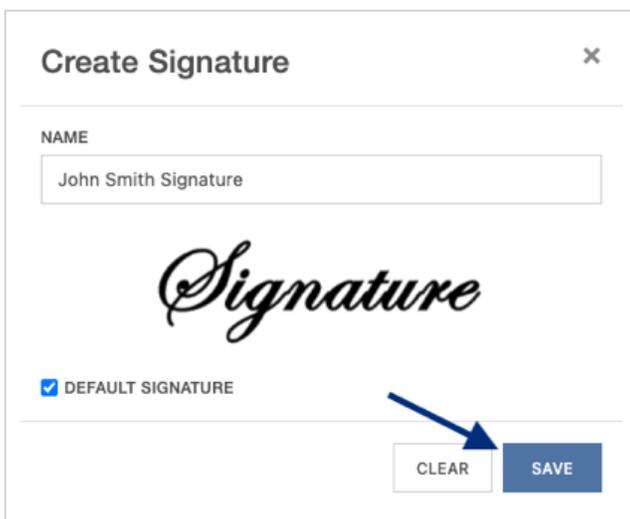
The Certificate Editor interface has a top navigation bar with tabs for Notes, History, CID, and Signature. The Signature tab is selected and underlined. Below the tabs, there are two links: 'EDIT EXISTING' and '+ ADD NEW'. A blue arrow points to the '+ ADD NEW' link. Below the links is a text input field with the placeholder text 'Choose a signature...'. At the bottom of the interface, there is a message 'You need to select a signature' and two buttons: 'CANCEL' and 'UPDATE CERTIFICATE'.

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



The 'Create Signature' form has a title bar with a close button (X). Below the title bar is a 'NAME' field containing 'John Smith Signature'. Below the name field is a section for the image upload. It includes the text 'RECOMMENDED IMAGE SIZE: 1600X500' and a dashed box containing the text 'Drag and drop your file here or click to browse'. Below the dashed box is the text 'ALLOWED FILE TYPE: .PNG, .JPG, .JPEG'. At the bottom left of the form is a checked checkbox labeled 'DEFAULT SIGNATURE'. At the bottom right are two buttons: 'CLEAR' and 'SAVE'.

Then click “Save”.



The 'Create Signature' form is shown in a state where a signature has been previewed. The 'NAME' field still contains 'John Smith Signature'. Below the name field is a large, stylized signature that reads 'Signature'. Below the signature is a checked checkbox labeled 'DEFAULT SIGNATURE'. At the bottom right, there are two buttons: 'CLEAR' and 'SAVE'. A blue arrow points to the 'SAVE' button.

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



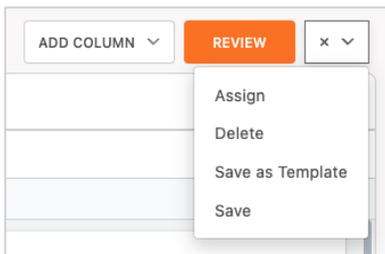
The signature on the certificate has been updated:



Completing the Certificate

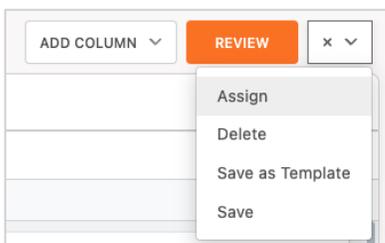
Once you have completed the creation of your certificate, there are several next options you can take. Across the top of the Certificate Editor, you will find the Editor Action buttons:

- Assign the certificate to another team member.
- Delete the certificate if it is no longer needed.
- Save the certificate details as a template for future use.
- Save the certificate to come back to later.
- Review the certificate prior to issuance.



Assigning the Certificate

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



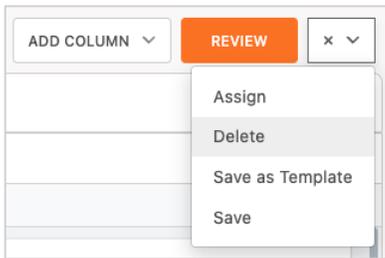
Search for and select the team member the certificate needs to be assigned to and click “Assign User”.

Please Note: The team member you assign to the certificate to must first have a Certificate Hero account.

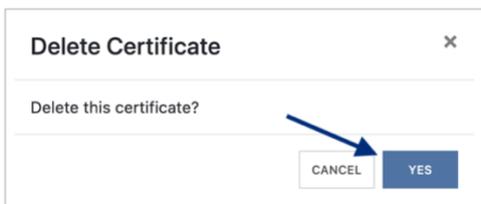


Deleting a Certificate in Progress

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

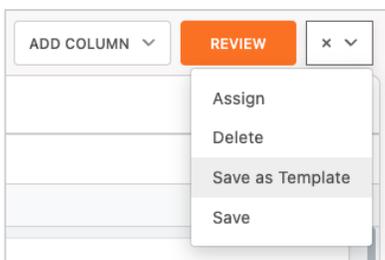


The system will prompt you to confirm if you wish to delete. Click “Yes” to proceed with the deletion.

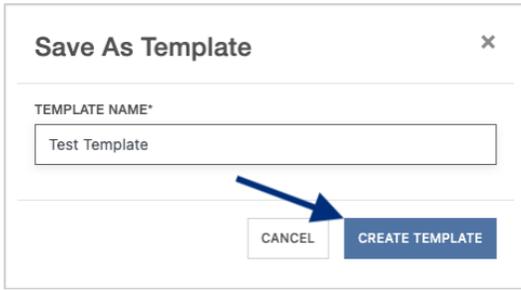


Saving as a Certificate Template

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



Enter a name for the new certificate template and click “Create Template”.



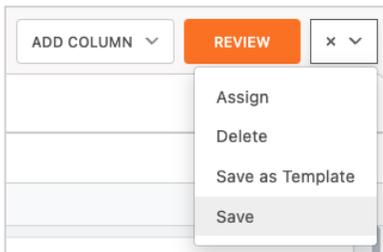
Once saved, you’ll receive confirmation on the upper right corner that your template has been saved. You can proceed with your current certificate issuance.



Saving Certificate for Later

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

Please Note: You can save the certificate at any point within the process.



You will be brought back to the Certificate Manager where you can find your saved certificate. The Actions menu will show you the options you can take with the saved certificate. To pick up where you left off, click “Edit”.

	CREATED	STATUS	CERT #	ISSUED	NAMED INSURED	HOLDER	SUMMARY	ACORD FORM	ENDORSEME...	ACTIONS
<input checked="" type="checkbox"/>	Dec 29, 2023	IN PROGRESS	4581613	—	TEST NAMED INS...	TEST HOLDER	AUTO, GL, UMB, ...	25	0	<input type="checkbox"/> View Edit Delete

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.

ACORD **CERTIFICATE OF LIABILITY INSURANCE** DATE (MM/DD/YYYY) 1/3/2024

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

CONTACT - Agency Contact
 Name
 Phone (555) 555-5555
 FAX (555) 555-4444
 Address: agencycontact@agencyemaildomain.com

INSURER A: CNA Insurance Companies
INSURER B:
INSURER C:
INSURER E:
INSURER F:

COVERAGES **CERTIFICATE NUMBER:** 2038 **REV. VERSION NUMBER:**

LINE	TYPE OF ASSURANCE	POLICY NUMBER	INSURER	START DATE	END DATE	LIMITS
A	COMMERCIAL GENERAL LIABILITY <input checked="" type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR	GLR120		09-01-2020	09-01-2021	EACH OCCURRENCE DAMAGE TO RENTED CONTENTS (EA RENTED) \$ 1,000,000 MED EXP (per occ event) \$ 50,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPOP AGG \$ 2,000,000
A	PERSONAL LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> HOMEOWNED <input checked="" type="checkbox"/> AUTOES ONLY <input checked="" type="checkbox"/> AUTOES ONLY	CAU9120		09-01-2020	09-01-2021	COMBINED SINGLE LIMIT \$A BODILY INJURY (per person) \$ 1,000,000 \$B BODILY INJURY (per accident) \$ 1,000,000 \$C PROPERTY DAMAGE \$D BODILY INJURY \$ 1,000,000
A	UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> CLAIMS MADE	EXCESS9120		09-01-2020	09-01-2021	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000
A	WORKERS COMPENSATION AND EMPLOYERS LIABILITY APPROXIMATE RATES: 7.0% (Mandatory in NY) (See description of SPECIALTY CODES)	OODWC9120		09-01-2020	09-01-2021	EACH ACCIDENT \$ 1,000,000 E.A. DISEASE - EA EMPLOYEE \$ 1,000,000 E.A. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 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.

CERTIFICATE HOLDER
 Sample Holder
 123 Main Street
 Miami, FL 33133

CANCELLATION
 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
 Certificate Hero

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ACORD **ADDITIONAL REMARKS SCHEDULE** Page 2 of 2

AGENCY CUSTOMER ID: _____
 LOC #: _____

ACORD
 YOUR AGENCY HERE
 POLICY NUMBER
 CARRIER
 NAC CODE
 EFFECTIVE DATE:

ADDITIONAL REMARKS
 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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Email the Certificate

To email the certificate, you will:

- Enter the destination email address(es).
- Enter the email subject line.
- Enter personalized verbiage for the email body.
- Mark whether the certificate needs to be deactivated after issuance.

Email **Fax**

TO: testemail@testemaildomain.com

CC:

BCC:

SUBJECT: Test Certificate

BODY: + LANGUAGE LIBRARY

Hello,
 Please see the attached and send confirmation of receipt.

ATTACH A FILE (OPTIONAL).
 Drag and drop your file here or click to browse

ALLOWED FILE TYPE: .JPG, .JPEG, .TXT, .DOCX, .CSV, .PDF

- Certificate contains at least one expired policy
 Mark certificate as inactive

COMPLETE COMPLETE & DOWNLOAD COMPLETE & EMAIL

Please Note: There is a language library available for certificate email distribution. Please refer to the Description of Operations [Language Library](#) to review how to utilize the tool.

Fax the Certificate

To fax the certificate, you will:

- Enter the destination fax number and contact name.
- Enter the fax subject.
- Enter any fax verbiage.
- Mark whether the certificate needs to be deactivated after issuance.

Form fields and options for faxing a certificate:

- Tab: **Fax**
- FAX NUMBER: (555) 555-5555
- NAME: John Smith
- SUBJECT: Test Certificate of Insurance
- Message: Please see the attached certificate of insurance.
- ATTACH A FILE (OPTIONAL): Drag and drop your file here or click to browse
- ALLOWED FILE TYPE: .JPG, .JPEG, .TXT, .DOCX, .CSV, .PDF
- Certificate contains at least one expired policy
- Mark certificate as inactive
- Buttons: COMPLETE, COMPLETE & DOWNLOAD, COMPLETE & FAX

Certificate Issuance

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

Buttons: COMPLETE, COMPLETE & DOWNLOAD, COMPLETE & EMAIL

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

Buttons: COMPLETE, COMPLETE & DOWNLOAD, COMPLETE & EMAIL

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

Buttons: COMPLETE, COMPLETE & DOWNLOAD, COMPLETE & EMAIL

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

Buttons: COMPLETE, COMPLETE & DOWNLOAD, COMPLETE & FAX