CERTIFICATE How to Issue a Certificate - Uploading a Contract

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Certificate Issuance	

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.

New Certificate	
O ACORD FORM	
SAMPLE CERTIFICATE CONTRACT	
Demo Sampl	e Contract.docx
ALLOWED FILE TYPE: .PDF, .DOCX	
O INSURANCE CLAUSE	
	CANCEL CREATE CERTIFICATE

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.



Customizing the Certificate Editor View

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



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.

Certificate Editor			ADD COLUMN V REVIEW
INSURANCE V	CERTIFICATE ~	CONTRACT ~	DOCUMENTS ~
Indicates some coverages are not compliant	ENDORSEMENTS V 0 endorsements attached	CLEAR HIGHLIGHTING QUICK FINDS ~	DOCUMENT CEDIT EXISTING + ADD NEW
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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 V 0 endorsements attached			
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Certificate Editor Views

Ce	ertificate	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.	1.
CERTIFICATE NOTES	
Notes that pertain to this specific certificate goes here.	
	1.
	SAVE

History

Displays an audit of activities related to the certificate.

ertificate 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.



Contract

Displays a copy of the contract that was uploaded.

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	Customer Lenal Nar	me	ABC Construction	John Harris	ontact	1	
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	Street Address		2345 Beacon Street			1	
	City, State, Zip	- 1	Boston, MA. 02110			1	
	Phone		(617) 555-5555			1	
						-	
	Email	j	jharris@abcconsstruction.com				
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	Email Builders Inc Inform	mation:	iharris@abcconsstruction.com Primary Sales (Contact]	
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Insurance

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

Certificate Editor		
INSURANCE V		×
Indicates some coverages are not compliant		
🖪 Builders Risk 🗕	- REMOVE LOB	~
Automobile Liability	- REMOVE LOB	~
Professional Liability / Errors & Omissions	- REMOVE LOB	~
🖪 General Liability 🛛	- REMOVE LOB	~
며 Worker's Compensation 自	- REMOVE LOB	~
Dumbrella/Excess Liability	- REMOVE LOB	~
	+ LINE OF BUS	INESS

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.

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Query

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



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

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SCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 161, Additional Remarks Schedule, may be attached if more space is required) Edit Description of Operation	SCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 161, Additional	Remarks Schedule, may b	e attached if more	space is require	d) Edit Descripti	on of Op	peration

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.

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1 6				QUICK FINDS V
		⊝ 149% ▼	Ð	Ð
		Master Services Agree	nent	
Customer	Information:	Brimany Business Contact	Drimory Billing Contact	
Customer	Lenal Name	ABC Construction	John Harris	
Contact N	ame	John Harris	John Hans	
Street Add	dress	2345 Beacon Street		
City, State	, Zip	Boston, MA. 02110		
Phone		(617) 555-5555		
Email		jharris@abcconsstruction.com		
Buildoro II	no Information			
Builders II	ne information	Primary Sales	Contact	
Contact N	ame Mirar	da Smith		
Phone	(615)	555-5555		
Email	msmi	th@buildersinc.com		
Legal Noti	ces			
	an Email			

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.

Q 6	Q	150% 🔻 🕀	<u>.</u>
Project 1/5 Match case Whole words Close	These STANDARD TERMS AND CONDITIONS ("Constant Terms") of the Max ABC Construction ("Customer"). Is made effective at of 1/1/2020 (Effective D Construction to receive "Services" (as defined below) us der these Standard Term Terms and Conditions and all service orders ("Service Ordere") attached hereto event of a conflict between the Standard Terms and any to ice Order(s), the Se The Agreement shall continue in effect until the completion of project taking place 1592), unless earlier terminated in accordance with the provisions of the Agreem SIGNATURE BELOW BY YOUR AUTHORIZED REPRESENTATIVE IS YOU AGREEMENT WHICH ARE	ster Services Agreement by and between Builders Inc ("Builders Inc") and ate"). "Customer" may include Customer's Affiliates approved by ABC ns. The systemment between the parties consists of the attached Standard or subsequentily signed or y-hangties (collectively, the "Agreement"). In the arvice Order(s) shall take precedence. e at Greenwood Park, 1234 Elmwood Drive, Nashville, TN 37210 (Project #: ent. The term of each Service Order is stated in the applicable Service Order IR CONSENT TO THE STANDARD TERMS AND CONDITIONS OF THE E ATTACHED HERETO	κ.]
	ABC Construction (by its authorized representative) By: Name: Title: Date:	Builders Inc (by its authorized representative) By: Name: Title: Date:	
	Last updated April 10, 2019 Page 1 of 1	6 Confidential	

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.

	AM BEST RATING	~	·
	Ū	Ł	000
Accident; \$1,000,000 Bodily Injury by Disease – Per Employee; and \$1,000,000 Bodily Injury by Disease – Policy Limit. (v) Umbrella Liability with a minimum each occurrence limit of \$5,000,000 and an aggregate limit of \$5,000,000. (VI) Builders Risk coverage is required for this project. (VII) Professional Liability Limit of \$1,000,000 will be required for this project. All insurers must have an AM Best Rating of A-VIII or higher. Certificates of insurance will be provided on request.			

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.

QUE	ΥΥ		Ø>
		Is Additional Insured status required?	
0	Yes, Additional Insure must procure and mai additional insured sta occurrence and \$4,00 damage.".	d status is required. The document states: "Customer intain Commercial General Liability insurance with tus, in an amount not less than \$2,000,000 per 00,000 in annual aggregate for bodily injury and property	
		Is WOS status required?	
Ø	The document does n status being required	ot contain any mention of Waiver of Subrogation (WOS)	
		What is the project number and address?	
U	The project number is Elmwood Drive, Nash	: 1592, and the project address is Greenwood Park, 1234 <i>v</i> ille, TN 37210.	
		What page can I find this on?	
6	The project number a project number is 159 Elmwood Drive, Nash	nd address can be found on page 1 of the document. The 2, and the project address is Greenwood Park, 1234 <i>v</i> ille, TN 37210.	
As	k a question		1
		Al can make mistakes. Check important info.	

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.

lificate Editor			ADD COLUMN V
	Assistant	× 🛛	
LEAR HIGHLIGHTING	of Subrogation (WOS) status being required.	0 endorsements attached	Indicates some coverages are not compliant
1 6	What is the project number and address?		🕩 Builders Risk 🙆 — REMOVE LOB 🗸
	The project number is 1592, and the project address is	CERTIFICATE OF LIABILITY INSURANCE LAUGE A 4 MITTE OF INFORMATION ONLY AND COMPERE NO REGISTRICATE INSUREM. THE MAXIMUM COMPERENCE AND IN A COMPACE AND REGISTRICATE INSUREM. THE A MAXIMAGE DOES NOT COMPETENCE AND A DECEMBER OF ADDRESS AND REAL AND A DECEMBER A MAXIMAGE DOES NOT COMPETENCE AND A DECEMBER AND REAL AND REAL AND A DECEMBER A MAXIMAGE DOES NOT COMPETENCE AND A DECEMBER AND REAL AND A DECEMBER A MAXIMAGE DOES NOT COMPETENCE AND A DECEMBER AND REAL AND A DECEMBER A MAXIMAGE DOES NOT COMPETENCE AND A DECEMBER AND REAL AND A DECEMBER A MAXIMUM AND A DECEMBER AND A DECEMBER AND REAL AND A DECEMBER A MAXIMUM AND A DECEMBER AND A DECEMBER AND A DECEMBER AND REAL AND A DECEMBER A MAXIMUM AND A DECEMBER AND A DECEMBER AND A DECEMBER AND A DECEMBER A MAXIMUM AND A DECEMBER AND A DECEMBER AND A DECEMBER AND A DECEMBER AND A DECEMBER A MAXIMUM AND A DECEMBER AND A DECEMBER AND A DECEMBER AND A DECEMBER AND A DECEMBER A MAXIMUM AND A DECEMBER AND A DECEMBER AND A DECEMBER AND A DECEMBER A MAXIMAGE DOES NOT COMPETENCE AND A DECEMBER AND A DECEMBER AND A DECEMBER A MAXIMUM AND A DECEMBER AND A DECEMBER AND A DECEMBER AND A DECEMBER A MAXIMUM AND A DECEMBER AND	C Automobile Liability 🕒 — REMOVE LOB 🗸
Customer Information: Peter Dustomer Legal Name ABC Construction Donter Name John Hanis Example Advances The Based	Greenwood Park, 1234 Elmwood Drive, Nashville, TN 37210.	aged to the service and sendences of the purphy, retitle public to the purphy and the the service and sendences of the public vector public to the service and	Professional Liability / Errors & 🕒 – REMOVE LOB 🗸 V
Diversion and Endowment and Section and Section (City, State, Zp) Boston, MA, 62110 Picces (S17) 555-5555 Email (Partis & abcorrection) Rediffere Inc. Information:	What page can I find this on?	Indicate, Violander Organia 2109 Indicate, Violander Organia 2109 Indicate Neurophyl Indicate Company 2109 Indicate Neurophyl Indicate Company 2009 Indicate Neurophyl Indicate Neuro	C General Liability G − REMOVE LOB ∨
Contact Name Minanda Smith Pisces (\$15,555-5555 Email mentith @buildesinc.com Land Kindnas	The project number and address can be found on page 1 of the document. The project number is 1592, and the project address is Greenwood Park, 1234 Elmwood	CONTINUENT WARESCE 1141 CONTINUENT AND ADDRESS AND ADDRESS AD	Worker's Compensation - REMOVE LOB
Logal Notice Email here STANDAFD TERMS AND CONDITIONS (*58 45° Construction (*Duatemer), is made effective as construction to receive "Benicles" (as defined below) inves and Constituents and all service orders (*Service	Drive, Nashville, TN 37210.	06.1129 06.1129 06.1129 06.1129 06.1129 06.1129 06.1129 06.1120 06.110	Umbrella/Excess Liability - REMOVE LOB
vent of a conflict between the Standard Terms and a he Agreement shall continue in effect and the comp 562, unless earlier terminated in accontance with th	Ask a question	CAU4420 OP-01-0220 OP-01-022 OP-01-02 OP-01-02 OP-01-02 OP-01-02 OP-01-02 OP-01-02	+ LINE OF BUSINESS
Mannes essen er rold Alfrödelzes Mill Centerion (an Andread synemisted) In: New Tits Date	Moders for 30 to Android Symposium		
Last updated April 10, 2019	Piget #5 Contienti	ALTONESS MEREISATINE Bigin Here: 0 1989-2015 ACORD CORPORATION, All rights reserved.	

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.

Certificate Editor		
INSURANCE ~		×
Indicates some coverages are not compliant		
📭 Builders Risk 🧕	- REMOVE LOB	~
📭 Automobile Liability 🧕	- REMOVE LOB	~
Professional Liability / Errors & Omissions a	- REMOVE LOB	~
🗗 General Liability 🧕	- REMOVE LOB	~
Worker's Compensation	- REMOVE LOB	~
Dubrella/Excess Liability	- REMOVE LOB	~
	+ LINE OF BUS	INESS

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.

idicates 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	~

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.

INSURANCE V		×
dicates some coverages are not compliant		
🗈 Builders Risk 🧕	- REMOVE LOB	~
📭 Automobile Liability 🖻	- REMOVE LOB	~
Professional Liability / Errors & Omissions	- REMOVE LOB	~
🗗 General Liability 📵	- REMOVE LOB	~
P Worker's Compensation	- REMOVE LOB	~
🕩 Umbrella/Excess Liability 📓	- REMOVE LOB	~

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.

					5
dicates some coverages are not (compliant				
🗗 Builders Risk 🗕					~
Automobile Liebility					
Automobile Liability Q	uto) with a combined s	ingle limit of \$1,000,	000 per accident for bod	- REMOVE LOB	
Automobile Liability Automobile liability: symbol 1 (any a damage; <u>Show Less</u>	uto) with a combined s	ingle limit of \$1,000,0	000 per accident for bod	- REMOVE LOB	Ĵ
Automobile Liability Automobile liability: symbol 1 (any a damage; <u>Show Less</u>	uuto) with a combined s CONTRACT	ingle limit of \$1,000,0 COVERAGE	000 per accident for bod COMPLIANT	ACTIONS	Ĵ
Automobile Liability (a) Automobile liability: symbol 1 (any a damage; <u>Show Less</u> REQUIREMENT Combined Single Limit	uuto) with a combined s CONTRACT \$1,000,000	COVERAGE	000 per accident for bod COMPLIANT YES	ACTIONS	Ĵ
Automobile Liability (a) Automobile liability: symbol 1 (any a damage; <u>Show Less</u> REQUIREMENT Combined Single Limit (a) Symbol 1 - Any Auto	uuto) with a combined s CONTRACT \$1,000,000 SPECIFIED	ingle limit of \$1,000,0 COVERAGE \$1,000,000 SPECIFIED	D00 per accident for bod	- REMOVE LOB	Ŷ

Requirements – Non-Compliant Line of Business (LOB)

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

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.

SURANCE	~				
			_		
ates some coverages a	re not con		7		
General Liability	ð				- REMOVE LOB
Commercial general liability	insurance w	ith additional insured s	tatus, in an amount not	less than \$2,000,000 per	occurrence and \$4,000,000
Commercial general liability in annual aggregate for bodi	insurance w ily injury and	ith additional insured s I property damage. <u>Sho</u>	status, in an amount not w <u>Less</u>	less than \$2,000,000 per	occurrence and \$4,000,000
Commercial general liability in annual aggregate for bodi REQUIREMENT	insurance w ily injury and	ith additional insured s property damage. <u>Sho</u> CONTRACT	tatus, in an amount not	less than \$2,000,000 per	occurrence and \$4,000,000 ACTIONS
Commercial general liability in annual aggregate for bodi REQUIREMENT	insurance w ily injury and	ith additional insured s property damage. <u>Sho</u> CONTRACT	itatus, in an amount not w Less COVERAGE	less than \$2,000,000 per	occurrence and \$4,000,000 ACTIONS
Commercial general liability in annual aggregate for bodi REQUIREMENT Each Occurrence Limit	insurance w ily injury and	ith additional insured s property damage. <u>Sho</u> CONTRACT \$2,000,000	tatus, in an amount not w Less COVERAGE \$1,000,000	COMPLIANT	ACTIONS
Commercial general liability in annual aggregate for bodi REQUIREMENT Each Occurrence Limit General Aggregate Limit	insurance w ily injury and Q	ith additional insured s property damage. Sho CONTRACT \$2,000,000 \$4,000,000	tatus, in an amount not w Less COVERAGE \$1,000,000 \$2,000,000	COMPLIANT NO NO	ACTIONS

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 boarder**.

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

NSURANCE V					E
icates some coverages are not	compliant				
📭 Professional Liability / Er	rors & Omissions)		- REMOVE LOB	^
Professional liability limit of \$1,000	,000 will be required for this	s project.			
Professional liability limit of \$1,000 REQUIREMENT	,000 will be required for this CONTRACT	coverage	COMPLIANT	ACTIONS	

Updating the Agency Contact

Within the contact section of the certificate, click "Select Contact".

u	ch endor	sement(s).			Select Contact
П	CONTACT NAME:	John Smith			
	PHONE (A/C, No, Ex	t): (555) 555-5555		FAX (A/C, No):	(555) 555-4444
	E-MAIL ADDRESS:	jsmith@certificateher	o.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...

×
🕑 EDIT EXISTING + ADD NEW

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

Edit Contact	×
CONTACT	C EDIT EXISTING + ADD NEW
Robert Johns	
Robert Johns	

Edit an Existing Agency Contact

To edit an existing contact, select the desired contact name and click "Edit Existing".

Certifica	ate Edito	or			
Notes	History	CID	Contact		
CONTACT			<u> </u>		ADD NEW
Agency	Contact				×
*Change	s have not b	een adde	ed	CANCEL UPDATE CER	TIFICATE

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	
Q SHOW CANCEL	AVE

Adding a New Agency Contact

To add a new contact, click "Add New".

Certific	ate Edito	r		
Notes	History	CID	Contact	~
CONTACT				C EDIT EXISTING + ADD NEV
Choose	a contact			
*Change	es have not b	een adde	ed	CANCEL UPDATE CERTIFICATE

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	
Z DEFAULT CONTACT	
Q SHOW PREVIEW CANCEL	

Once you have selected, revised, or added an Agency Contact, click "Update Certificate" to reflect the change on the certificate.

ertific	ate Edito	or			
Notes	History	CID	Contact		
CONTACT				C EDIT EXISTING	+ ADD NEW
Agency	Contact				×
*Change	es have not b	een adde	ed	CANCEL UPDATE O	CERTIFICATE

The Agency Contact on the certificate has been updated:

ich endor	sement(s).		Select Contact
CONTACT NAME:	Agency Contact		
PHONE (A/C, No, Ex	u: (555) 555-5555	FAX (A/C, No):	(555) 555-4444
E-MAIL ADDRESS:	agencycontact@agencyemaild	omain.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.

Certific	ate Edito	or			
Notes	History	CID	Named Insured	-	
FIRST NAM	IED INSURED			🕑 EDIT EXISTIN	IG + ADD NEW
NAMED	INSURED				~
ADDITION	AL NAMED INSU	JRED(S)			
BUILDER	RS, INC.				~
				CANCEL	

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

ertifica	ate Edito	r			
Notes	History	CID	Named Insured		
FIRST NAM	IED INSURED			🖒 EDIT EXISTING	+ ADD NEW
NAMED I	NSURED				~
Туре	to filter				
Builder	rs, Inc.				
Archite	ects LLC				
Named	I Insured				

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

Certifica	ate Edito	r			
Notes	History	CID	Named Insured		
FIRST NAM	ED INSURED			C EDIT EXISTING	+ ADD NEW
NAMED I	NSURED				~
Name	el				
Named	Insured				

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.

Notes	History	CID	Named Insured		
IRST NAM	IED INSURED			C EDIT EXISTING	+ ADD NEV
NAMED	INSURED				~
DDITION	AL NAMED INSU	JRED(S)			
BUILDEF	AL NAMED INSU	JRED(S)			~
BUILDEF	AL NAMED INSU RS, INC.	JRED(S)			~
BUILDEF	AL NAMED INSU RS, INC. e to filter	JRED(S)			~

Edit an Existing Named Insured

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

Certifica	ate Edito	r			
Notes	History	CID	Named Insured	_	
FIRST NAM	IED INSURED				IG + ADD NEW
NAMED I	NSURED				~
ADDITION	AL NAMED INSU	IRED(S)			
BUILDER	S, INC.				~
*Change	s have not b	een adde	d	CANCEL UPDAT	E 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	
СІТҮ	
Anywhere	
STATE	ZIP CODE
CA ~-	90210
Q 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".

Notes	History	CID	Named Insured	
FIRST NAM	IED INSURED			+ ADD NEV
BUILDER	RS, INC.			~
	AL NAMED INSU	JRED(S)		
ADDITION/				

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	
СІТҮ	
Anywhere	
STATE	ZIP CODE
CA ~~~	90210
Q. SHOW PREVIEW	CANCEL SAVE

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

Certific	ate Edito	r			
Notes	History	CID	Named Insured		
FIRST NAM	MED INSURED			C EDIT EXISTING	+ ADD NEW
NAMED	INSURED				~
ADDITION	AL NAMED INSU	JRED(S)			
BUILDER	RS, INC.		~		~
*Change	es have not b	een adde	ed	CANCEL UPDATE	CERTIFICATE

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)	LIMIT	s
COMMERCIAL GENERAL LIABILITY						EACH OCCURRENCE	\$
CLAIMS-MADE OCCUR			ridd i ollog			DAMAGE TO RENTED PREMISES (Ea occurrence)	\$
						MED EXP (Any one person)	\$
						PERSONAL & ADV INJURY	\$
GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	\$
POLICY PRO- JECT LOC						PRODUCTS - COMP/OP AGG	\$
OTHER:							\$

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.

neral Liability	CHOOSE PROFILE				
omotive	NO PROFILE	~			EDIT EXISTING + ADD
brella	POLICY NUMBER	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	DESCRIPTION
kers Comp					
	COMMERCIAL GENERAL LIABI	LITY	Certificate Only Field	EACH OCCURRENCE LIMIT	Value
ADD LOB V	CLAIMS-MADE BASIS	OCCURRENCE BASIS	Certificate Only Field	DAMAGE TO RENTED PREMISES LIMIT	Value
	COVERAGE A	Coverage A Name	WAIVER OF SUBHOGATION	MEDICAL EXPENSE	Value
	COVERAGE B	Coverage B Name		PERSONAL & ADVERTISING LIMIT	Value
	PER POLICY PER	PROJECT PER LOCATION		GENERAL AGGREGATE LIMIT	Value
	PER OTHER	Other Name		PRODUCTS - COMP/OP AGGREGATE LIMIT	Value
				Coverage Name	Value

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	CHOOSE PROFILE
Automotive	NO PROFILE ~
	No Profile
Umbrella	2020 GL (Default) - 20-21 General Liability
Workers Comp	HIDE EXPIRED

motive	2020 GL (DEFAULT) - 20-21 GENERAL	L L ¥			EDIT EXISTING + ADD
rella	POLICY NUMBER	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	DESCRIPTION
ers Comp	GL9120	20-21 General Liability	09-01-2020	09-01-2021	
	AMS Value: Checked		Certificate Only Field		AMS Value: 1,000,000
ADD LOB ~	COMMERCIAL GENERAL LIABIL	LITY	ADDITIONAL INSURED	EACH OCCOMMENCE LIMIT	
	AMS Value: Unchecked	AMS Value: Checked	Certificate Only Field WAIVER OF SUBROGATION	DAMAGE TO RENTED PREMISES	AMS Value: 50,000
	AMS Value: Unchecked	AMS Value: Not Found			AMS Value: 5.000
	COVERAGE A	Coverage A Name		MEDICAL EXPENSE	5,000
	AMS Value: Unchecked	AMS Value: Not Found			AMS Value: 1,000,000
	COVERAGE B	Coverage B Name		PERSONAL & ADVERTISING LIMIT	
	AMS Value: AM	IS Value: AMS Value:			AMS Value: 2,000,000
	Unchecked A Unc	checked Unchecked		GENERAL AGGREGATE LIMIT	2,000,000
	AMS Value: Unchanked	AMS Value: Not Found		PRODUCTS - COMP/OP AGGREGATE	AMS Value: 2,000,000
	PER OTHER	Other Name		LIMIT	2,000,000
				Coverage Name	Value

This will populate the data from your LOB Profiles Manager.

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

General Liability Automotive Umbrella Workers Comp HIDE EXPIRED CHOOSE PROFILE No Profile 2020 CAU (Default) - 20-21 Auto Liabil Workers Comp HIDE EXPIRED CHOOSE PROFILE No Profile Umbrella CHOOSE PROFILE No Profile	
Automotive Umbrella U	_
Umbrella No Profile Workers Comp HIDE EXPIRED HIDE EXPIRED CHOOSE PROFILE Automotive No Profile	~
Umbrella Workers Comp Line of Business General Liability Automotive Limbrella CHOOSE PROFILE NO PROFILE No Profile	
Workers Comp HIDE EXPIRED Line of Business General Liability Automotive Imbrella	ity
CHOOSE PROFILE Automotive No Profile Imprella	
General Liability CHOOSE PROFILE Automotive No Profile Umbrella	
Automotive No Profile No Profile	
No Profile	
limnraila	
2020 CUB (Default) - 20 -21 Excess Liabi	lity
Workers Comp 2020 EXE \$1mil - 20 -21 Excess Liability	
HIDE EXPIRED	
Line of Business	
General Liability CHOOSE PROFILE	
Automotive	
Umbrella No Profile	,
2020 WC (Default) - 20-21 WC OOS (NH, CT,	RI)
Workers Comp 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".

L	ine of Business		×
I	General Liability	CHOOSE PROFILE	<u> </u>
ľ	Automotive	2020 GL (DEFAULT) - 20-21 GENERAL L 🗸	C EDIT EXISTING + ADD NEW

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.

eneral Liability	CHOOSE PROFILE									
utomotive	2020 GL (DEFAULT) - 20-21 GENE	RAL L 🗸							SAVE +	· ADD NE
mbrella	POLICY NUMBER	POLI	CY NAME		EFFECTIVE DATE		EXPIRATION DATE	t	DESCRIPTION	
	GL9120		-21 General Liability	/	09-01-2020		09-01-2021			
orkers Comp	AME Values Checked					*E	xample: \$1,000,0	00 AMS value	e edited to \$	500,0
ADD LOB ~	COMMERCIAL GENERAL LIA	BILITY			EAC	CH OCCURRENCE LIMIT		500,000		
	AMS Value: Unchecked		AMS Value: Ch	ecked				MS Value: 50,000)	
	CLAIMS-MADE BASIS		OCCURRENCI	E BASIS	DAN	MAGE TO RENTED PREN	IISES LIMIT	50,000		
	AMS Value: Unchecked		AMS Value: Not	t Found			,	MS Value: 5,000		
	COVERAGE A		Coverage A N	lame	MED	DICAL EXPENSE		5,000		
	AMS Value: Unchecked		AMS Value: No	t Found			4	MS Value: 1,000,0	000	
	COVERAGE B		Coverage B N	lame	PER	SONAL & ADVERTISING	LIMIT	1,000,000		
	AMS Value: Unchecked	AMS Val	lue: Unchecked	AMS Value: Linc	becked		4	AMS Value: 2,000,000		
	PER POLICY		ROJECT	PER LOCATION	GEN	VERAL AGGREGATE LIM	т	2,000,000		
							A	MS Value: 2,000,	000	
	AMS Value: Unchecked		AMS Value: Not	t Found	PRO	DUCTS - COMP/OP AG	GREGATE LIMIT	2,000,000		
			Other Name		0	overage Name		×	Value	
	+ ADD OVERFLOW COVERAGE									

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".

l	ine of Business		×
	General Liability	CHOOSE PROFILE	<u> </u>
ľ		2020 GL (DEFAULT) - 20-21 GENERAL L 🗸	C EDIT EXISTING + 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.

Create Gene	ral Liabi	lity LOB Profile
ACORD FORM		
ACORD 25	\sim	
POLICY		
	\sim	
LOB TYPE		
	\sim	
LOB TYPE NAME		
PROFILE NAME		
SET AS DEFAULT		

Select the desired policy from the Policy drop down.

Create Gene	eral Liabi	lity LOB Profile
ACORD FORM		
ACORD 25	~	
POLICY		
	~	
(2020-09-01) GL	9120 20-21 Ge	neral Liability
н	IDE EXPIRED	
LOB TYPE NAME		

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 L	OB Profile
ACORD FORM	
ACORD 25 \checkmark	AMS Value: Ch
POLICY	
(2020-09-01) GL9120 20-21 GEN 🗡	AMS Value: Ur
LOB ТҮРЕ	AMS Value: Ur
GL 🗸	
LOB TYPE NAME	AMS Value: Ur
General Liability	
PROFILE NAME	
2020 Sample GL	AMS Value: Ur
SET AS DEFAULT	AMS Value- Ur

Review and confirm the data pulled from the AMS.

ACORD FORM	AMS Value: Checked				AMS Value: 1.000	000	
ACORD 25 V	COMMERCIAL GENERAL LIAB	ILITY		EACH OCCURRENCE LIMIT	1 000 000		
POLICY			Oh a sha d		1,000,000	-	
(2020-09-01) GL9120 20-21 GEN 🗡	CLAIMS-MADE BASIS	AMS Value: Checked		DAMAGE TO RENTED PREMISES LIMIT	AMS Value: 50,00	0	
			Net Found		50,000		
	YPE AMS Value: Unchecked AMS Value		Not Found		AMS Value: 5,000		
GL	_ outerstarts	Coverage	A Name	MEDIGAL EXPENSE	5,000		
LOB TYPE NAME	AMS Value: Unchecked	AMS Value	Not Found		AMS Value: 1,000	,000	
General Liability	COVERAGE B	Coverage	B Name	PERSONAL & ADVERTISING LIMIT	1,000,000		
PROFILE NAME					AMS Value: 2 000	000	
2020 Sample GL	AMS Value: Unchecked	AMS Value: Unchecked	AMS Value: Unchecked	GENERAL AGGREGATE LIMIT	2,000,000	,000	
SET AS DEFAULT	AMS Value: Unchecked	AMS Value	Not Found		AMS Value: 2,000,000		
	PER OTHER	Other Na	me	PRODUCTS - COMP/OP AGGREGATE LIMIT	2,000,000		
				Coverage Name	×	Value	
	+ ADD OVERFLOW COVERAGE						
					<u> </u>		

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.



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".

eneral Liability	CHOOSE PROFILE				
tomotive	2020 GL (DEFAULT) - 20-21 GENERA	ul L ~			C EDIT EXISTING + ADD
nbrella	POLICY NUMBER	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	DESCRIPTION
rkers Comp	GL9120	20-21 General Liability	09-01-2020	09-01-2021	
	AMS Value: Checked		Certificate Only Field		AMS Value: 1,000,000
add lob \sim	COMMERCIAL GENERAL LIABI		ADDITIONAL INSURED	EACH OCCURHENCE LIMIT	
	AMS Value: Unchecked	AMS Value: Checked	Certificate Only Field	DAMAGE TO RENTED PREMISES	AMS Value: 50,000
	AMS Value: Unchecked	AMS Value: Not Found			AMS Value: 5,000
	COVERAGE A	Coverage A Name		MEDICAL EXPENSE	5,000
	AMS Value: Unchecked	AMS Value: Not Found			AMS Value: 1,000,000
	COVERAGE B	Coverage B Name		PERSONAL & ADVERTISING LIMIT	
	AMS Value: AM	IS Value: AMS Value:		GENERAL AGGREGATE LIMIT	AMS Value: 2,000,000
	Unchecked A Un	checked Unchecked PER PROJECT PER LOCATION			2,000,000
	AMS Value: Unchecked	AMS Value: Not Found		PRODUCTS - COMP/OP AGGREGATE	AMS Value: 2,000,000
	PER OTHER	Other Name		LIMIT	2,000,000
				Coverage Name	Value

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

CO	VEF	AGES	CER	TIFIC	CATE	NUMBER: 2638			REVISION NUMBER:			
	THIS IS TO CERTIFY THAT THE POLICIE INDICATED. NOTWITHSTANDING ANY F CERTIFICATE MAY BE ISSUED OR MAY EXCLUSIONS AND CONDITIONS OF SUCI					RANCE LISTED BELOW HAVE BEE NT, TERM OR CONDITION OF AN THE INSURANCE AFFORDED BY LIMITS SHOWN MAY HAVE BEEN F	N ISSUED TO Y CONTRACT THE POLICIE REDUCED BY	O THE INSURE OR OTHER I S DESCRIBEI PAID CLAIMS.	ED NAMED ABOVE FOR TH DOCUMENT WITH RESPECT D HEREIN IS SUBJECT TO	HE POLICY PERIOD CT TO WHICH THIS O ALL THE TERMS,		
INSR LTR		TYPE OF INSURANCE		TYPE OF INSURANCE		ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMIT	S
	×	COMMERCIAL GENER	AL LIABILITY			Add Policy			EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person)	\$ 1,000,000 \$ 50,000 \$ 5,000		
A				×	X	GL9120	09-01-2020	09-01-2021	PERSONAL & ADV INJURY	\$ 1,000,000		
	GE	N'L AGGREGATE LIMIT A	PPLIES PER:						GENERAL AGGREGATE	\$ 2,000,000		
		POLICY X PRO- JECT	LOC						PRODUCTS - COMP/OP AGG	\$ 2,000,000		
		OTHER:								\$		
	AU.	TOMOBILE LIABILITY				Add Policy			COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000		
	X	ANY AUTO							BODILY INJURY (Per person)	\$		
A		OWNED AUTOS ONLY	SCHEDULED			CALI9120	09-01-2020	09-01-2020 09-01-2021	BODILY INJURY (Per accident)	\$		
		HIRED AUTOS ONLY	NON-OWNED AUTOS ONLY			0409120			PROPERTY DAMAGE (Per accident)	\$		
										\$		
		UMBRELLA LIAB	× OCCUR			Add Policy			EACH OCCURRENCE	\$ 5,000,000		
A	X	EXCESS LIAB	CLAIMS-MADE			EXCESS9120	09-01-2020	09-01-2021	AGGREGATE	\$ 5,000,000		
		DED RETENTIO	DN \$							\$		
	WO	RKERS COMPENSATION				Add Policy			X PER OTH- STATUTE ER			
	ANY	PROPRIETOR/PARTNER/				00SWC9120	09-01-2020	09-01-2021	E.L. EACH ACCIDENT	\$ 1,000,000		
$ ^{\sim}$	OFF (Ma	IGER/MEMBEREXCLUDE		A, A		003003120	00-01-2020	00-01-2021	E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000		
	If ye DES	s, describe under CRIPTION OF OPERATION	ONS below						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".

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

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.

Certificat	te Edito	r					
Notes	History	CID	Desc of Ops				
ADDITIONAL	NAMED INSU	IREDS 🚄					
Builders,	Inc.			•			11
DESCRIPTIO	N OF OPERAT	IONS				+ LANGUAG	E LIBRARY
Type desi		perations	lext here				1.
					CANCEL	UPDATE CER	TIFICATE

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.

additional			≘ FILTER ~				TOGGLE COLUMNS	+ CREATE NEW	C ED
	NAME			CONTENT			CREAT	ED	
	Invalid	The Gen	rral Liability and	d Auto policies includ	e blanket auto		Dec 11, 2	023	
10 ROWS 🗸		«	<	1 2	3 7	> >>			

Editing Language Library Template

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

Ad	d To D	escription Of Op	erations						>
Q	Q. AI & WOS		æ filter ∨	TOGGLE C	DLUMNS \vee	+ CREATE NEW	🖒 EDIT		
		NAME \downarrow		CONTENT		CREATED		STATUS	
	4	General Liability AI & WOS	Certifica	e holder is included as Additional Insured	i, on a Pri	Jan 3, 2024		ACTIVE	

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

Edit Language	×
NAME *	
General Liability AI & WOS	
CONTENT *	
Editing this Template	
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 require written contract.	d by
Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.	
	11
CANCEL	SAVE

Create a New Language Library Template

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

Add To	Description Of O	perations				-	×
Q GL			≊ FILTER ∨			TOGGLE	COLUMNS ~ + CREATE NEW
	NAME \downarrow		CONTENT		CREATED		STATUS
	GL (AI PnC WOS)	Certifica	te holder is included as additional insure	ed, on a pri	Jun 1, 2022		ACTIVE

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

Create Language	×
NAME '	
General Liability AI & WOS	
CONTENT *	
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 rewritten contract.	equired by
Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.	
~	
CANCEL	SAVE

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

Add To D	escription Of O	perations						×
Q GL			≊ FILTER ∨		TOG	GLE COLUMNS 🗸	+ CREATE NEW	🖒 EDIT
	NAME \downarrow		CONTENT		CREATED		STATUS	
•	GL (AI PnC WOS)	Certificate	holder is included as additional insur	ed, on a pri	Jun 1, 2022		ACTIVE	
10 ROWS 🗸			« < [1 > >>	•			
						CLOSE	ADD DESCRIPTION OF O	PERATIONS

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.

lotes	History	CID	Desc of Ops	
DDITIONAL	NAMED INSU	IREDS		
Builders,	Inc.			
ESCRIPTIO	N OF OPERAT	IONS		+ LANGUAGE LIBRAR
Project #	: 123456			

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 INSURE	EDS	
Builders, Inc.		
DESCRIPTION OF OPERATIO	NS	+ LANGUAGE LIBRARY
Project #: 123456		
Certificate holder is incl respects the General Lia	uded as Additional Insured, on a Prima	ry and Non-contributory basis, as
contract.	ability, including ongoing and complete	ed operations, if required by written
contract. Waiver of Subrogation a required by written cont	pplies in favor of the Additional Insure	d as respects the General Liability, if
contract. Waiver of Subrogation a required by written cont	pplies in favor of the Additional Insure rract.	a operations, if required by written d as respects the General Liability, if
contract. Waiver of Subrogation a required by written cont	pplies in favor of the Additional Insure ract.	a operations, if required by written d as respects the General Liability, if
contract. Waiver of Subrogation a required by written cont	pplies in favor of the Additional Insure ract.	a operations, if required by written
contract. Waiver of Subrogation a required by written cont	upplies in favor of the Additional Insure ract.	a operations, ir required by written
contract. Waiver of Subrogation a required by written cont	upplies in favor of the Additional Insure ract.	d operations, if required by written

The DOO on the certificate has been updated:



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,	Edit Description of Operations
FORM NUMBER: FORM TITLE:	
Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written cont	ract.

Updating the Certificate Holder

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

IOLDER	
	Select/Add Holder
	-

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

Certifica	ate Edito	or			
Notes	History	CID	Holder	~	
HOLDER		/	•	🕑 EDIT EXISTI	NG + ADD NEW
Enter a	holder				
HOLDER A	DDRESS				
CHOOSE	HOLDER ADD	RESS			~
				CANCEL UPD/	ATE CERTIFICATE

Selecting an Existing Holder

To select an existing Holder, click the Holder name.

Certifica	te Edito	r				
Notes	History	CID	Sample Certificate	Holder		
HOLDER				🕑 ED	IT EXISTING	+ ADD NEW
Sample H	lolder					×
HOLDER AD	DRESS					
123 MAIN	STREET MIAM	II, FL 33133	8			~
*Changes	have not b	een adde	ed	CANCEL	UPDATE	CERTIFICATE

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

Ce	ertifica	ate Edito	or			
1	Notes	History	CID	Sample Certificate	Holder	
н	OLDER				🕑 EDIT EXISTING +	ADD NEW
	Enter a h	nolder				
	ALLY F	INANCIAL				
	Bank o	of America, N	.A.			
	City of	Boston				
	City of	Framingham	I			
	City of	Marlborough	ı			
	City of	New Orleans	5			
	City of	Raleigh				
	City of	Shrewsbury				

...Or type ahead to find the Holder you would like to select.

ertifica	ate Edito	r				
Notes	History	CID	Sample Certificate	Holder		
LDER				🕑 EDI	T EXISTING -	+ ADD NEW
SAMPL	Holder					
Sampl	e Holder					
сноозе	HULDER ADDE	(E33				÷
				CANOLI	and the second	DTIFICATE

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.

Certifica	ate Edito	or					
Notes	History	CID	Holder				
HOLDER					🕑 EDI	TEXISTING	+ ADD NEW
Sample	Holder						×
HOLDER AI	DDRESS			/			
123 MAIN	STREET MIAN	11, FL 33133					~
*Change	s have not b	een adde	d		CANCEL	UPDATE	CERTIFICATE

Edit an Existing Holder

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

Notes	History	CID	Holder	
HOLDER				STING + ADD NE
Sample	Holder			×
HOLDER A	DDRESS			

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".

Edit Holder					×
				00111701	
123 Main Street	ADDRESS LINE 2	ADDRESS LINE 3	Miami FL 33133	USA	EDIT
					LOIT REMOVE
			ADD ADDRESS		
Q SHOW PREVIEW					CANCEL SAVE

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

Edit Holder Address	×
NAME *	
Sample Holder - EDIT	
ADDRESS LINE 1	
123 Main Street	
ADDRESS LINE 2	
Suite 456	
ADDRESS LINE 3	
CITY	
Miami	
COUNTRY	
USA	~
STATE	
FL .	~-
POSTAL CODE	
33133	
Q SHOW PREVIEW	CANCEL UPDATE ADDRESS

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

Create Holder					×
NAME *					
ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	CITY STATE ZIPCODE	COUNTRY	
123 Main Street			Miami FL 33133	USA	EDIT REMOVE
			ADD ADDRESS		
Q SHOW PREVIEW					CANCEL SAVE

Add a New Holder

To add a new Certificate Holder, click "Add New".

Notes	History	CID	Holder	
HOLDER				C EDIT EXISTING + ADD NE
Enter a	holder			
HOLDER A	DDRESS			
CHOOSE	HOLDER ADD	RESS		~

Enter the new Holder name.

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

Create Holder				×
NAME * Sample Holder				
ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	CITY STATE ZIPCODE	COUNTRY
		ADD ADDRESS		
Q SHOW PREVIEW				CANCEL SAVE

Fill out the address form and click "Add Address".

Edit Holder Address	×
NAME *	
Sample Holder	
ADDRESS LINE 1	
123 Main Street	
ADDRESS LINE 2	
ADDRESS LINE 3	
GITY	
Miami	
COUNTRY	
USA	~
STATE	
FL	~*
POSTAL CODE	
33133	
Q SHOW PREVIEW	CANCEL 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		
Q SHOW PREVIEW					CANCEL

Once you have selected, revised, or added a Holder, click "Update Certificate" to reflect the change to the certificate.

Certifica	ate Edito	or					
Notes	History	CID	Holder				
HOLDER					🕑 EDIT	EXISTING	+ ADD NEW
Sample	Holder						×
HOLDER AL	DDRESS			~			
123 MAIN	STREET MIAN	/I, FL 33133					~
*Change	s have not b	een adde	ed		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.

Certificate Editor					
Notes	History	CID	Signature	~	
SIGNATUR	E			C EDIT EXISTING + ADD NEW	
Choose	a signature				
You need	d to select a	signatur	e	CANCEL UPDATE CERTIFICATE	

Selecting an Existing Signature

To select an existing Signature, click to choose a signature.

Certific	ertificate Editor			
Notes	History	CID	Signature	
SIGNATUR	E		/	🕑 EDIT EXISTING + ADD NEW
Choose	a signature			
You need	d to select a	signatur	e	CANCEL UPDATE CERTIFICATE

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



...Or type ahead to find the signature you would like to select.

ertifica	ate Edito	or		
Notes	History	CID	Signature	
SIGNATUR	E			🕑 EDIT EXISTING + ADD NEW
test NV				

Edit an Existing Signature

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

ertific	Certificate Editor				
Notes	History	CID	Signature		
SIGNATUR	E		/	EDIT EXISTING + ADD NEW	
Test NV	/			×	
*Change	es have not b	een adde	ed	CANCEL UPDATE CERTIFICATE	

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

Modify Signature		×
NAME		
Test		
RECOMMENDED IMAGE SIZE: 160	0X500	
Drag and drop your fil	e here or click to brows	e
ALLOWED FILE TYPE: .PNG, .JPG,	.JPEG	
DEFAULT SIGNATURE		
	CLEAR	SAVE

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

NAME	
Test	
Ði	gnature

Adding a New Signature

To add a new Signature, click "Add New".

Certific	ate Edito	r		
Notes	History	CID	Signature	~
SIGNATUR	E			EDIT EXISTING + ADD NEW
Choose	a signature			
You need	d to select a	signature	9	CANCEL UPDATE CERTIFICATE

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



Then click "Save".

Create Signature ×				
NAME				
John Smith Signature				
Sign	ature			
DEFAULT SIGNATURE				

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

Notes	History	CID	Signature	
BIGNATUR	E			C EDIT EXISTING + ADD NEW
Test NV	r		~	×

The signature on the certificate has been updated:

AUTHORIZED REPRESENTATIVE	Ol.
Sign Here	Lignature

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".

REVIEW × ~
Assign
Delete
Save as Template
Save

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.

Assign User		×
Nicole Vandgrift: nvandgrif	t@certificatehero.com	×
	CANCEL ASSIG	N USER

Deleting a Certificate in Progress

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

ADD COLUMN 🗸	REVIEW × V
	Assign
	Delete
	Save as Template
	Save

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

Delete Certificate		×
Delete this certificate?		
	CANCEL	YES

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".

ate	>
CANCEL	CREATE TEMPLATE
	ate

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.

Template TEST TEMPLATE saved	×
------------------------------	---

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".



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.

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ON		MARCI	E	1/3/2024	
CENTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEN BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTIT	LY AND CONFERS NO D, EXTEND OR ALTER UTE A CONTRACT BE	RIGHTS UR R THE COV	PON THE CERTIFICAT ERAGE AFFORDED E HE ISSUING INSURER	TE HOLDER. THIS BY THE POLICIES (S), AUTHORIZED	ADDITIONAL REMARKS SCHEDULE Page 2 of
REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER. IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, th If SUBROGATION IS WAIVED, subject to the terms and conditions of	e policy(ies) must have the policy, certain polic	ADDITION	AL INSURED provision equire an endorsement	s or be endorsed. t. A statement on	YOUR AGENCY HERE Named Insured POLICY NUMBER
this certificate does not confer rights to the certificate holder in lieu of	such endorsement(s).	alad			CARNER NAUC CODE
	PHONE (665) 565	6.6666	FAX	(666) 666 4444	EFFECTIVE DATE:
ddress Line 1	E-MAR adencycont	tactifianenc	(AC, Nol: vemaildomain.com	(555) 555-4444	ADDITIONAL REMARKS
ddress Line 2	ADDRESS: 0.9110/1010	BERITS AFFOR	NA CONTRACE	NAME	THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM.
ity, State Zip	INSURER A : CNA Insur	rance Comp	anies	36137	FORM NUMBER: FORM TITLE:
SURED	INSURER B :				
amed losured	INSURER C :				Waiver of Subrogation applies in favor of the Additional insured as respects the General Liability, if required by written contract.
23 Main Street	INSURER D :				
nywhere, CA 90210	INSURER E :				
	INSURER F :				
OVERAGES CERTIFICATE NUMBER: 2638 THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW I NDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION DESTRUCTED. LINK BE INFORM ON ADVANCE LISTED OF	AVE BEEN ISSUED TO TO N OF ANY CONTRACT OF	THE INSURED	REVISION NUMBER: D NAMED ABOVE FOR T OCUMENT WITH RESPE	HE POLICY PERIOD	
EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HA	E BEEN REDUCED BY PA	UD CLAIMS.	HEREIN IS SUBJECT IN	U ALL THE TERMS,	
R TYPE OF INSURANCE INSUR	POLICY EFF P	POLICY EXP	LIMIT	15	
COMMERCIAL GENERAL LIABILITY			EACHOCOURRENCE	\$ 1,000,000	
CLAIMS-MADE X OCCUR			PREMISES (Ea occurrence)	s 50,000	
		1	MED EXP (Any one person)	s 5,000	
X X GL9120	09-01-2020 06	9-01-2021	PERSONAL & ADV INJURY	s 1,000,000	
GENL AGGREGATE LIMIT APPLIES PER		1	GENERAL AGGREGATE	\$ 2,000,000	
POLICY X JECT LOC		-	PRODUCTS - COMPIOP AGG	\$ 2,000,000 \$	
AUTOMOBILE LIABILITY			COMBINED SINGLE LIMIT (E.a.accident)	\$ 1,000,000	
X ANY AUTO			BOOLY NURY (Per person)	8	
A OWNED SCHEDULED CAU9120	09-01-2020 05	9-01-2021	BOOLY INJURY (Per accident)	8	
AUTOS ONLY AUTOS ONLY			PROPERTY DAMAGE (Per woldert)	5	
				8	
Werellallas X occur	00-01-2020 00	0.01.2021	EACHOCOURRENCE	\$ 5,000,000	
CLAMS-MICE EXCESS9120 EXCESS9120	09-01-2020 09	19-01-2021	AGGREGATE	\$ 5,000,000	
AND EMPLOYERS' LIABILITY Y/N			X STATUTE ER		
OFFICEPAMEMBEREDELLIDED? N/A OOSWC9120	09-01-2020 09	9-01-2021	E.L. EACH ACCIDENT	\$ 1,000,000	
(Mandatory in NH) If yes, describe under		-	E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000	
DESCRIPTION OF OPERATIONS below			E.L. DISEASE - POLICY LIMIT	\$ 1,000,000	
ISCHETOL OF OPERATIONS / LOCATIONS / VEHICLES (ACOND 101, Addisonal Remarks Sch Additional Named Insureds: Builders, Inc. Yogiect 8: 123456	dule, may be attached if more sp	space is required	0		5
Certificate holder is included as Additional Insured, on a Primary and Non-co completed operations, if required by written contract.	ntributory basis, as respec	cts the Gene	eral Liability, including or	igoing and	
ERTIFICATE HOLDER	CANCELLATION				
iample Holder 23 Main Street fiami, FL 33133	SHOULD ANY OF THE THE EXPIRATION ACCORDANCE WITH	E ABOVE DE DATE THE THE POLICY	SCRIBED POLICIES BE C REOF, NOTICE WILL I PROVISIONS.	ANCELLED BEFORE BE DELIVERED IN	
	AUTHORIZED REPRESENTA	ATIVE	Certificate Hero		
1			-		
CORD 25 (2016/03) The ACORD name and logo	© 1988 are registered marks o	8-2015 ACO of ACORD	ORD CORPORATION.	All rights reserved.	ACORD 101 (2006/01) © 2008 ACORD CORPORATION. All rights reser

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.

CC	
4	,
+ LANGUAGE LI	BRAR
ation of receipt.	,
drop your file here or click to browse	
CSV, .PDF	
ed policy	
e	cc + LANGUAGE LI ation of receipt. drop your file here or click to browse .GSV, .PDF ed policy

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.

(000) 000-000	John Smith
SUBJECT	Please see the attached certificate of insurance.
Test Certificate of Insurance	
Drag and dr	op your file here or click to browse
Drag and dr ALLOWED FILE TYPE: JPG, JPEG, JTXT, LDOCX, .Ct	op your file here or click to browse SV, PDF

Certificate Issuance

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



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



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



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

