



How to Issue a Certificate

Selecting the ACORD Form Type/COI Template

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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

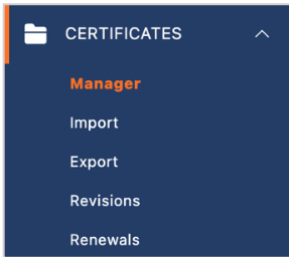
This method will allow you to enter the insurance requirements and pull the required policies.

This guide will take you through how to issue a certificate by [selecting the ACORD from type](#).

You will learn how to issue using a blank ACORD Form and using a COI Template.

Starting the Certificate Issuance Process

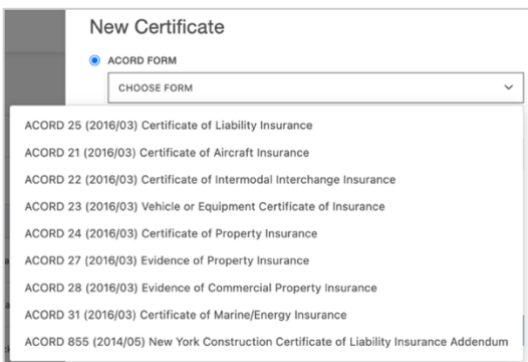
To begin, drop down the “Certificates” menu and click “Manager”.



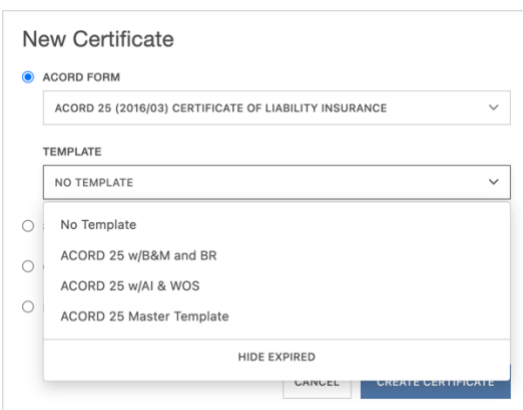
Within the Certificate Manager, click the orange “Create Certificate” button.



Select the desired ACORD form type.



You can select a previously created COI Template, or to continue without a template with a blank ACORD Form.



Blank ACORD Form

After selecting the desired ACORD form and template preference, click the blue “Create Certificate” button.

New Certificate

ACORD FORM

ACORD 25 (2016/03) CERTIFICATE OF LIABILITY INSURANCE

TEMPLATE

NO TEMPLATE

SAMPLE CERTIFICATE

CONTRACT

INSURANCE CLAUSE

CANCEL CREATE CERTIFICATE

This will bring you to the Certificate Editor, which is split in two sections – the COI resources on the left and a preview of the ACORD form itself on the right.

Certificate Editor

ASSIGN DELETE SAVE AS TEMPLATE SAVE REVIEW

ENDORSEMENTS 0 endorsements attached

154%

ACORD CERTIFICATE OF LIABILITY INSURANCE DATE (MMDDYYYY) 1/2/2024

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). [Select Contact](#)

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

INSURED
Buildex, Inc.
95 Rochester Street
Telesboro, NJ 07968

COVERAGES
CERTIFICATE NUMBER: 2638
REVISION NUMBER:

TRM LTR	TYPE OF INSURANCE	ADDC	INSUR	ROSD	POLICY NUMBER	POLICY EFF. DATE (MMDDYYYY)	POLICY EXP. DATE (MMDDYYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY							EACH OCCURRENCE \$
	CLAIMS-MADE							DAMAGE TO RENTED PREMISES (S&AW) \$
	OCUR							MED EXP (Any one person) \$
								PERSONAL & ADV INJURY \$
								GENERAL AGGREGATE \$
								PRODUCTS - COMP/OP AGG \$

GENERAL AGGREGATE LIMIT APPLIES PER:
POLICY PRO LOC OTHER

Save

The certificate preview on the right provides a real-time display of any additions and edits you make to a certificate.

The **GREY selectors** indicate areas on the certificate that you can interact with and modify.

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

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



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
12/28/2023

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		CONTACT NAME: Kristin Collins	
YOUR AGENCY HERE Address Line 1 Address Line 2 City, State Zip		PHONE (A/C, No, Ext): 1-800-HERO	FAX (A/C, No):
		E-MAIL ADDRESS: kcollins@certificatehero.com	
		INSURER(S) AFFORDING COVERAGE	
		NAIC #	
INSURED		INSURER A:	
Builders, Inc. 95 Rochester Street Teterboro, NJ 07608		INSURER B:	
		INSURER C:	
		INSURER D:	
		INSURER E:	
		INSURER F:	

Select Named Insured(s)

COVERAGES **CERTIFICATE NUMBER:** 4546350 **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
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR			Add Policy			EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COM/PO/AGG \$
	GENL AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						
	OTHER:						
	AUTOMOBILE LIABILITY ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			Add Policy			COMBINED SINGLE LIMIT (Ea 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			Add Policy			EACH OCCURRENCE \$ AGGREGATE \$
	DED RETENTION \$						
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	Add Policy			PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

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

CERTIFICATE HOLDER	CANCELLATION
Select/Add Holder	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	<i>Signature</i>

ACORD 25 (2016/03)

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When beginning your certificate with a blank ACORD Form, you will utilize the above grey selectors to fill out the various fields of the certificate.

The following fields will start off without data entered.

- Selecting the Policies/LOB profiles
- Entering the Certificate Holder
- Adding verbiage to the Description of Operations
- Attaching Endorsements

The following fields will start off with the selected default data entered.

- Named Insured
- Agency Contact
- Signature

COI Template

Certificate Hero templates are designed to contain pre-entered policy information and data that can be used when starting a certificate. When you select a template to issue from, the system automatically populates the pre-entered policy information and data.

Importantly, any changes made to the certificate during the processing flow will only modify that specific certificate, leaving the original template intact.

After selecting the ACORD Form type, select the template you would like to use. To proceed, click the blue "Create Certificate" button.

New Certificate

ACORD FORM

ACORD 25 (2016/03) CERTIFICATE OF LIABILITY INSURANCE

TEMPLATE

ACORD 25 MASTER TEMPLATE

SAMPLE CERTIFICATE

CONTRACT

INSURANCE CLAUSE

CANCEL CREATE CERTIFICATE

This will bring you to the Certificate Editor, which is split in two sections – the COI resources on the left and a preview of the ACORD Form itself on the right.

Certificate Editor

ASSIGN DELETE SAVE AS TEMPLATE SAVE REVIEW

NOTES History CID

INSURED NOTES

CERTIFICATE NOTES

ENDORSEMENTS 0 endorsements attached

149%

ACORD CERTIFICATE OF LIABILITY INSURANCE

PRODUCER: John Smith

INSURED: Bulders Inc.

TYPE	TYPE OF INSURANCE	POLICY NUMBER	ISSUE DATE	EXPIRES	REVISION NUMBER	LIMITS
A	GENERAL LIABILITY	GL9120	09-01-2020	09-01-2021	1	\$ 1,000,000
B	AUTOMOBILE LIABILITY	CAUB120	09-01-2020	09-01-2021	1	\$ 1,000,000
A	EXCESS LIABILITY	EXCESS09120	09-01-2020	09-01-2021	1	\$ 1,000,000
C	WORKER COMPENSATION	WC9135	09-01-2020	09-01-2021	1	\$ 1,000,000

The system will populate the policy information and data that was pre-entered on the COI Template.

		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 12/24/2024															
<p>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.</p> <p>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</p>																			
PRODUCER YOUR AGENCY HERE Address Line 1 Address Line 2 City, State Zip		CONTACT NAME: John Smith PHONE: (555) 555-5555 FAX: (555) 555-4444 E-MAIL ADDRESS: jsmith@certificatehero.com																	
INSURED Builders Inc. 529 Woodland St South Glastonbury, CT 06073		Select Named Insured(s)		<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Fireman's Fund Insurance Company</td> <td>21873</td> </tr> <tr> <td>INSURER B: USLI Investment Corporation</td> <td>21518</td> </tr> <tr> <td>INSURER C: Security National Insurance Co</td> <td>33120</td> </tr> <tr> <td>INSURER D: Travelers Insurance Company</td> <td>36137</td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </tbody> </table>		INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Fireman's Fund Insurance Company	21873	INSURER B: USLI Investment Corporation	21518	INSURER C: Security National Insurance Co	33120	INSURER D: Travelers Insurance Company	36137	INSURER E:		INSURER F:	
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INSURER C: Security National Insurance Co	33120																		
INSURER D: Travelers Insurance Company	36137																		
INSURER E:																			
INSURER F:																			
COVERAGES		CERTIFICATE NUMBER: 14121		REVISION NUMBER:															
<p>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.</p>																			
INSTR	TYPE OF INSURANCE	ADD SUBR	POLICY NUMBER	POLICY EFF	POLICY EXP	LIMITS													
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:		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) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000													
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <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"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED: RETENTION \$		Add Policy EXCESS9120	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000													
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N/A	Add Policy WC9135	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													
			Add Policy																
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Edit Description of Operations																			
CERTIFICATE HOLDER		CANCELLATION																	
Select/Add Holder		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																	
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If any changes need to be made to the certificate during the processing flow, this will modify only this specific certificate, leaving the original template intact. To learn how to update any of the fields on the certificate, click the links below:

- Selecting the Policies/LOB profiles
- Entering the Certificate Holder
- Adding verbiage to the Description of Operations
- Attaching Endorsements
- Named Insured
- Agency Contact
- Signature

[Back to Top](#)

Updating the Agency Contact

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

uch endorsement(s).		Select Contact
CONTACT NAME:	Kristin Collins	
PHONE (A/C, No, Ext):	1-800-HERO	FAX (A/C, No):
E-MAIL ADDRESS:	kcollins@certificatehero.com	

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

Certificate Editor

Notes History CID **Contact**

CONTACT [EDIT EXISTING](#) + [ADD NEW](#)

Kristin Collins ✕

Selecting an Existing Agency Contact

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

Certificate Editor

Notes History CID **Contact**

CONTACT [EDIT EXISTING](#) + [ADD NEW](#)

Kristin Collins ✕

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

Certificate Editor

Notes History CID **Contact**

CONTACT [EDIT EXISTING](#) + [ADD NEW](#)

Choose a contact...

- Rebecca's Agency Contact (Default)
- Agency Contact
- Kristin Collins

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

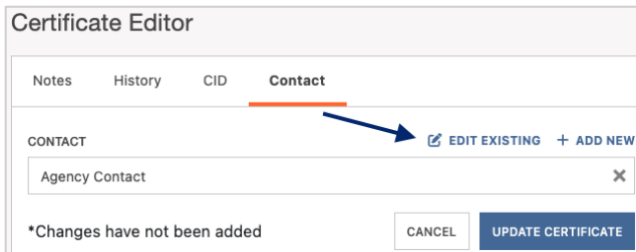
CONTACT [EDIT EXISTING](#) + [ADD NEW](#)

agency CONTACT

AGENCY CONTACT

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

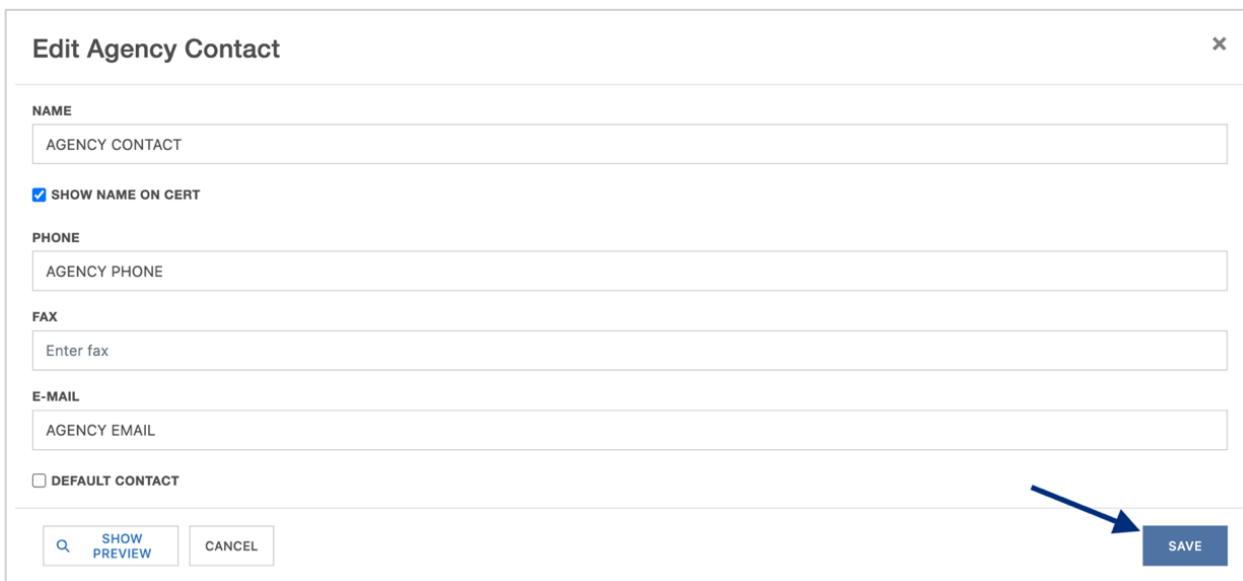
Agency Contact

*Changes have not been added

CANCEL UPDATE CERTIFICATE

[EDIT EXISTING](#) [+ ADD NEW](#)

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

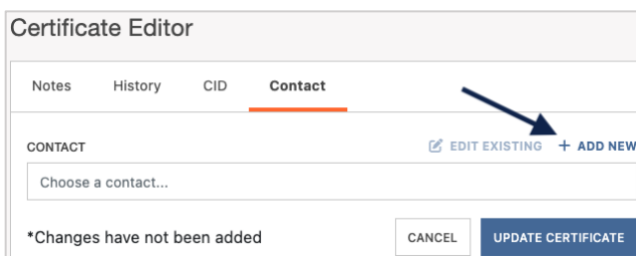
DEFAULT CONTACT

SHOW PREVIEW CANCEL

SAVE

Adding a New Agency Contact

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



Certificate Editor

Notes History CID **Contact**

CONTACT

Choose a contact...

*Changes have not been added

CANCEL UPDATE CERTIFICATE

[EDIT EXISTING](#) [+ ADD NEW](#)

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 EDIT EXISTING + ADD NEW

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)”.

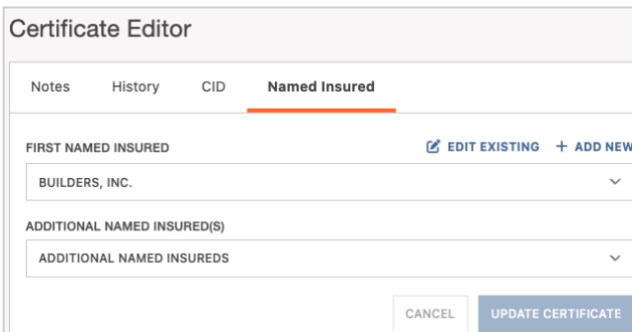


INSURED

Builders, Inc.
95 Rochester Street
Teterboro, NJ 07608

Select Named Insured(s)

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



Certificate Editor

Notes History CID **Named Insured**

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

BUILDERS, INC.

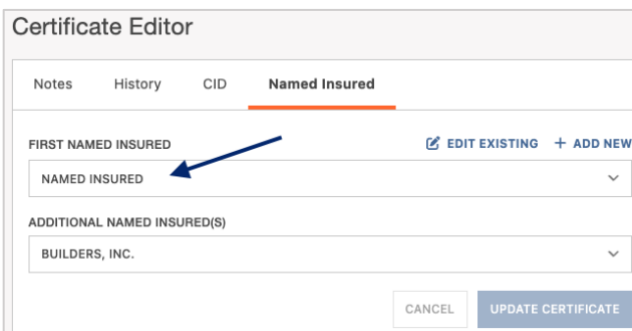
ADDITIONAL NAMED INSURED(S)

ADDITIONAL NAMED INSUREDS

CANCEL UPDATE CERTIFICATE

Selecting an Existing Named Insured

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



Certificate Editor

Notes History CID **Named Insured**

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

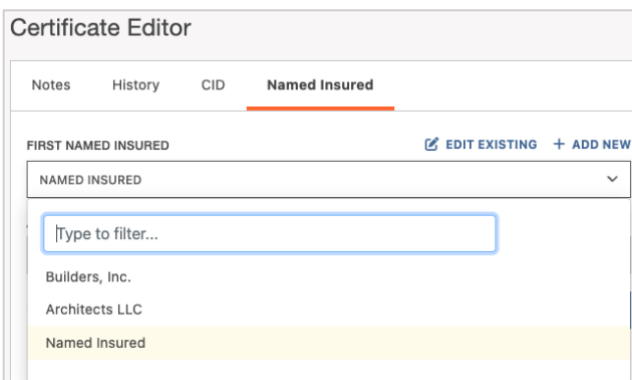
NAMED INSURED

ADDITIONAL NAMED INSURED(S)

BUILDERS, INC.

CANCEL UPDATE CERTIFICATE

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



Certificate Editor

Notes History CID **Named Insured**

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

NAMED INSURED

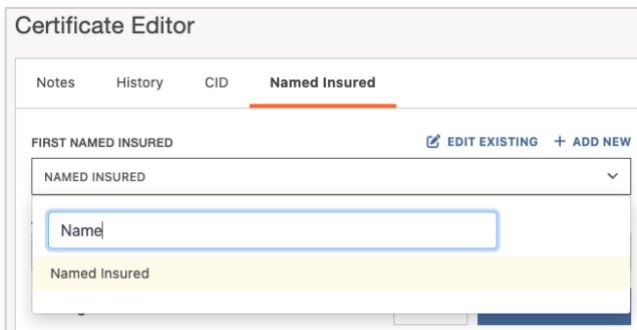
[Type to filter...]

Builders, Inc.

Architects LLC

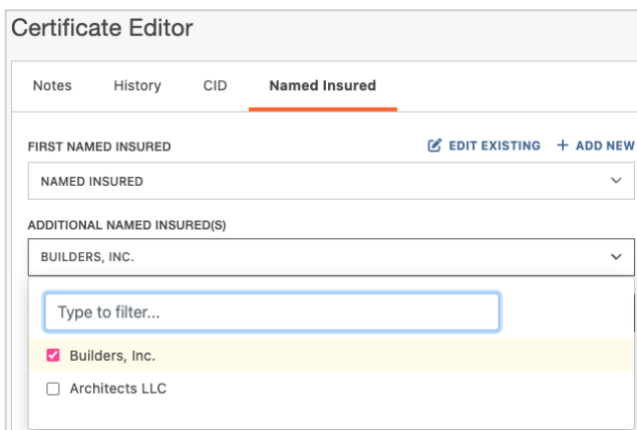
Named Insured

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



The screenshot shows the 'Certificate Editor' interface with the 'Named Insured' tab selected. Under the 'FIRST NAMED INSURED' section, there is a dropdown menu currently showing 'NAMED INSURED'. Below the dropdown is a search input field with the text 'Name' and a blue border. A yellow highlight is visible under the search input field.

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.



The screenshot shows the 'Certificate Editor' interface with the 'Named Insured' tab selected. Under the 'ADDITIONAL NAMED INSURED(S)' section, there is a dropdown menu currently showing 'BUILDERS, INC.'. Below the dropdown is a search input field with the text 'Type to filter..'. Below the search input field is a list of options: 'Builders, Inc.' (checked) and 'Architects LLC' (unchecked). A yellow highlight is visible under the 'Builders, Inc.' option.

Edit an Existing Named Insured

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



The screenshot shows the 'Certificate Editor' interface with the 'Named Insured' tab selected. Under the 'FIRST NAMED INSURED' section, there is a dropdown menu currently showing 'NAMED INSURED'. Below the dropdown is a search input field with the text 'Type to filter..'. Below the search input field is a list of options: 'Builders, Inc.' (checked) and 'Architects LLC' (unchecked). A yellow highlight is visible under the 'Builders, Inc.' option. A blue arrow points to the 'EDIT EXISTING' button. At the bottom of the form, there is a status message: '*Changes have not been added' and two buttons: 'CANCEL' and '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 CA **ZIP CODE** 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

CANCEL UPDATE CERTIFICATE

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

SHOW PREVIEW CANCEL SAVE

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

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)	LIMITS	
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 +

POLICY NUMBER	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	DESCRIPTION
<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY		Certificate Only Field	EACH OCCURRENCE LIMIT	Value
<input type="checkbox"/> CLAIMS-MADE BASIS	<input type="checkbox"/> OCCURRENCE BASIS	<input type="checkbox"/> ADDITIONAL INSURED	DAMAGE TO RENTED PREMISES LIMIT	Value
<input type="checkbox"/> COVERAGE A	Coverage A Name	Certificate Only Field	MEDICAL EXPENSE	Value
<input type="checkbox"/> COVERAGE B	Coverage B Name	<input type="checkbox"/> WAIVER OF SUBROGATION	PERSONAL & ADVERTISING LIMIT	Value
<input type="checkbox"/> PER POLICY	<input type="checkbox"/> PER PROJECT		GENERAL AGGREGATE LIMIT	Value
<input type="checkbox"/> PER OTHER	<input type="checkbox"/> PER LOCATION		PRODUCTS - COMP/OP AGGREGATE LIMIT	Value
	Other Name			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.



This will populate the data from your Agency Management System (AMS).

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
 OCCURRENCE BASIS

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

Certificate Only Field
 ADDITIONAL INSURED

Certificate Only Field
 WAIVER OF SUBROGATION

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

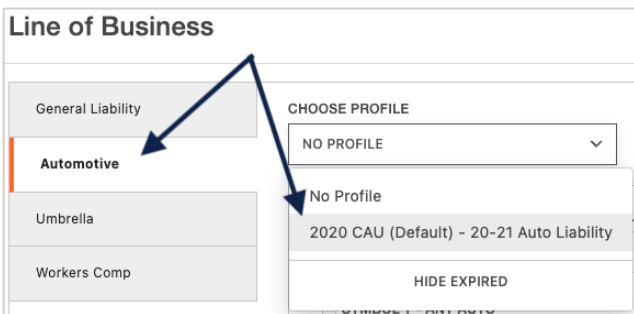
GENERAL AGGREGATE LIMIT
AMS Value: 2,000,000
2,000,000

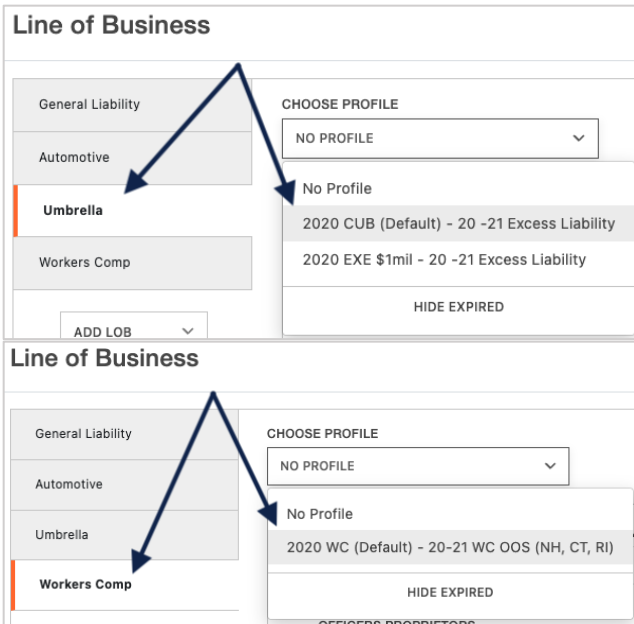
PRODUCTS - COMP/OP AGGREGATE LIMIT
AMS Value: 2,000,000
2,000,000

Coverage Name Value

CANCEL SAVE

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





...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 across the board.

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.

Create General Liability LOB Profile

ACORD FORM
ACORD 25

POLICY
[Empty dropdown]

LOB TYPE
[Empty dropdown]

LOB TYPE NAME
[Empty text input]

PROFILE NAME
[Empty text input]

SET AS DEFAULT

Select the desired policy from the Policy drop down.

Create General Liability LOB Profile

ACORD FORM
ACORD 25

POLICY
[Dropdown menu open]

- (2020-09-01) GL9120 20-21 General Liability

HIDE 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 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 OTHER

AMS Value: Checked
 OCCURRENCE BASIS

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

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

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
 OCCURRENCE BASIS

AMS Value: Not Found
Coverage A Name

AMS Value: Not Found
Coverage B Name

AMS Value: Unchecked
 PER PROJECT

AMS Value: Not Found
Other Name

Certificate Only Field
 ADDITIONAL INSURED

Certificate Only Field
 WAIVER OF SUBROGATION

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

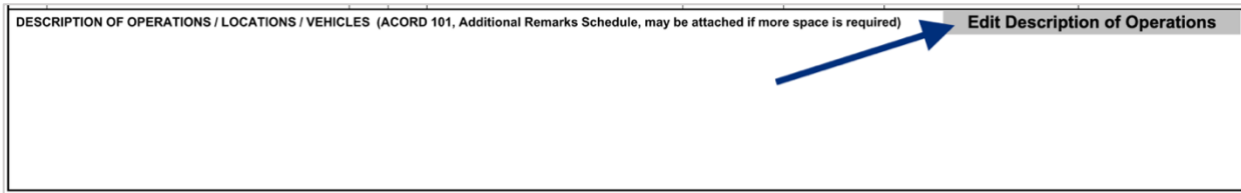
The selected policies and any applicable revisions or additions are now reflected on the certificate:

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"/>	GL9120 Add Policy	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 OWNED AUTOS ONLY <input type="checkbox"/> HIRE AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY			CAU9120 Add Policy	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 RETENTION \$			EXCESS9120 Add Policy	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			OOSWC9120 Add Policy	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

[Back to Top](#)

Updating the Description of Operations

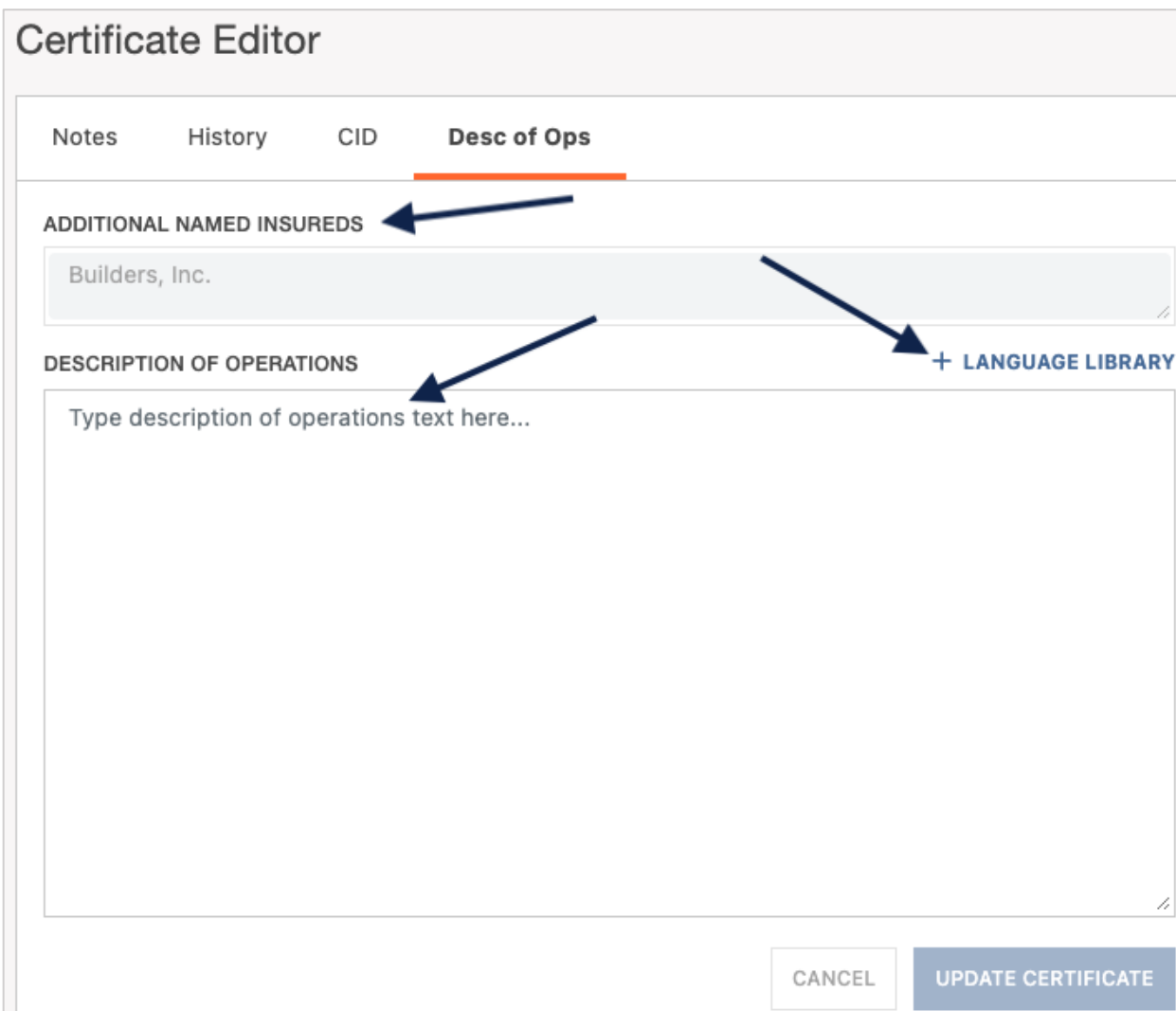
To add verbiage to your Description of Operations (DOO), click “Edit Description of Operations”.



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

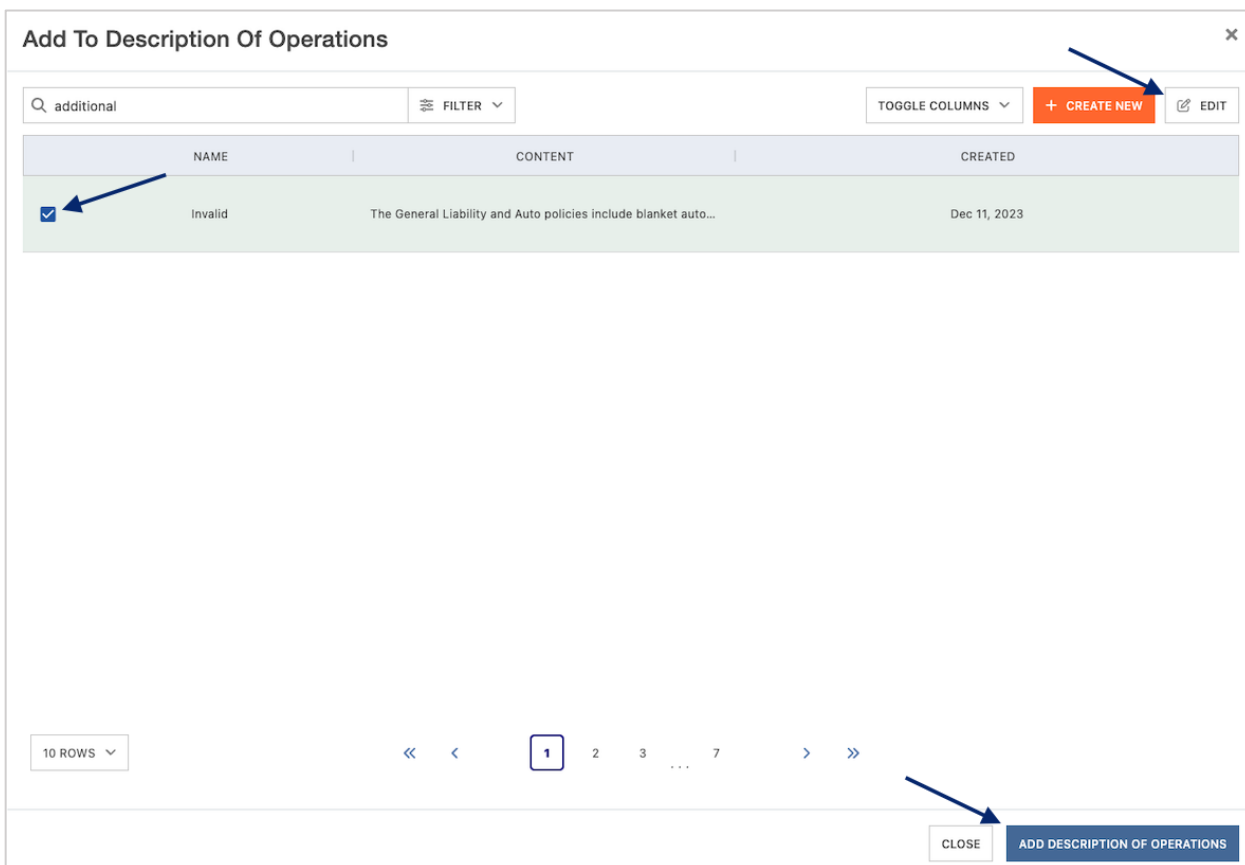
To view your verbiage templates, click “Language Library”.



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.

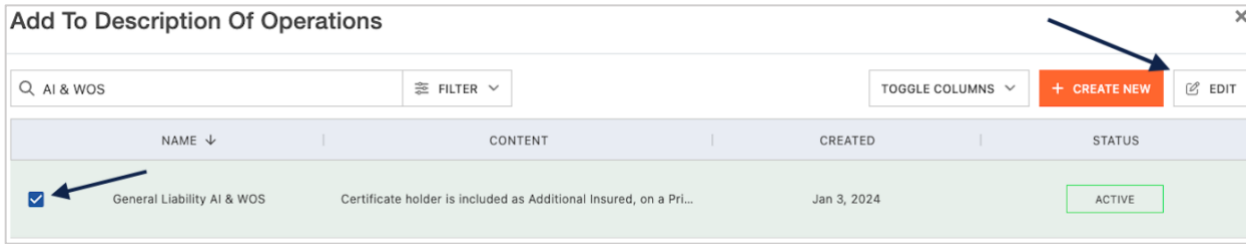


The screenshot shows a modal window titled "Add To Description Of Operations" with a close button (X) in the top right corner. At the top left, there is a search bar containing the text "additional" and a "FILTER" button. To the right of the search bar are "TOGGLE COLUMNS" and a red "+ CREATE NEW" button. Further right is an "EDIT" button with a pencil icon. Below this is a table with three columns: "NAME", "CONTENT", and "CREATED". The table has one row with a checked checkbox in the first column, the name "Invalid", the content "The General Liability and Auto policies include blanket auto...", and the date "Dec 11, 2023". At the bottom left, there is a "10 ROWS" dropdown menu. In the center, there is a pagination control showing "1" selected, with "2", "3", and "7" as other options. At the bottom right, there are two buttons: "CLOSE" and "ADD DESCRIPTION OF OPERATIONS".

	NAME	CONTENT	CREATED
<input checked="" type="checkbox"/>	Invalid	The General Liability and Auto policies include blanket auto...	Dec 11, 2023

Editing Language Library Template

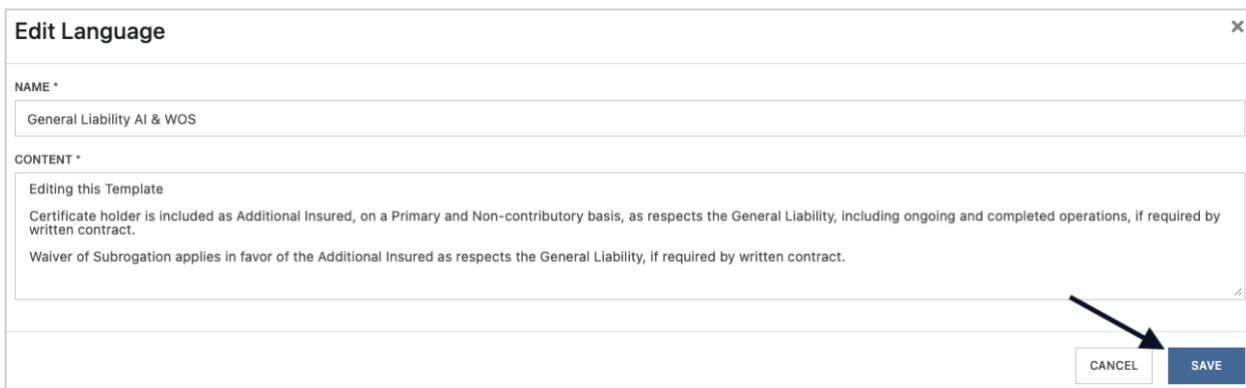
To add an existing Language Library template, ensure the template you want to edit is checked and click “Edit”.



The screenshot shows a dialog titled "Add To Description Of Operations" with a search bar containing "AI & WOS" and a "FILTER" dropdown. A "TOGGLE COLUMNS" dropdown and a red "+ CREATE NEW" button are also visible. Below is a table with columns: NAME, CONTENT, CREATED, and STATUS. The first row is checked with a blue checkbox and has an arrow pointing to it. The "EDIT" button is also highlighted with an arrow.

NAME ↓	CONTENT	CREATED	STATUS
<input checked="" type="checkbox"/> General Liability AI & WOS	Certificate holder is included as Additional Insured, on a Pri...	Jan 3, 2024	ACTIVE

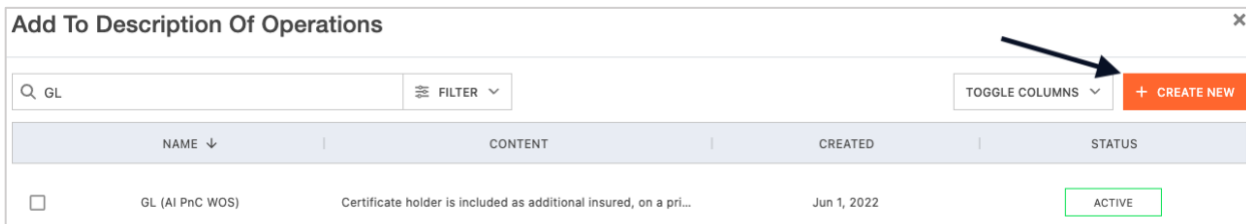
Within the edit form, proceed with the revisions and click “Save”.



The screenshot shows the "Edit Language" form. The "NAME" field contains "General Liability AI & WOS". The "CONTENT" field contains two paragraphs of text. The "SAVE" button is highlighted with an arrow.

Create a New Language Library Template

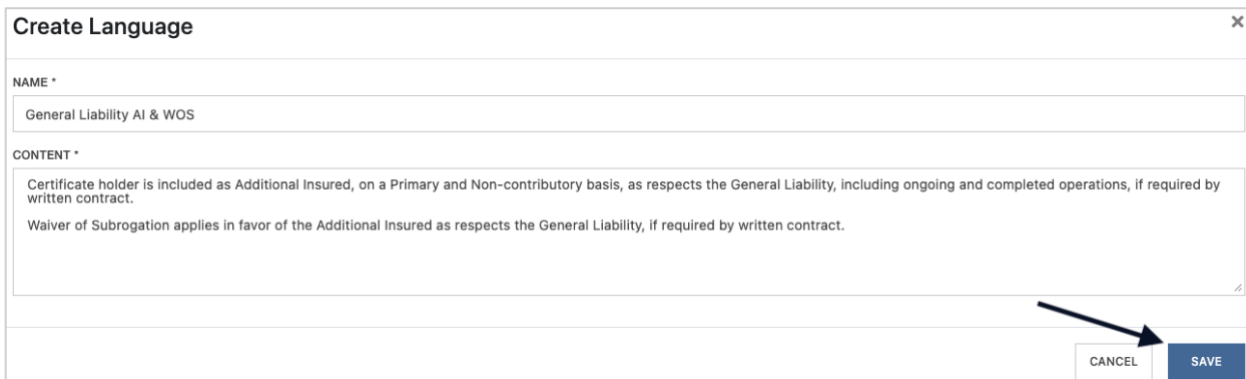
To create a new Language Library template, click “Create New”.



The screenshot shows a dialog titled "Add To Description Of Operations" with a search bar containing "GL" and a "FILTER" dropdown. A "TOGGLE COLUMNS" dropdown and a red "+ CREATE NEW" button are also visible. Below is a table with columns: NAME, CONTENT, CREATED, and STATUS. The "CREATE NEW" button is highlighted with an arrow.

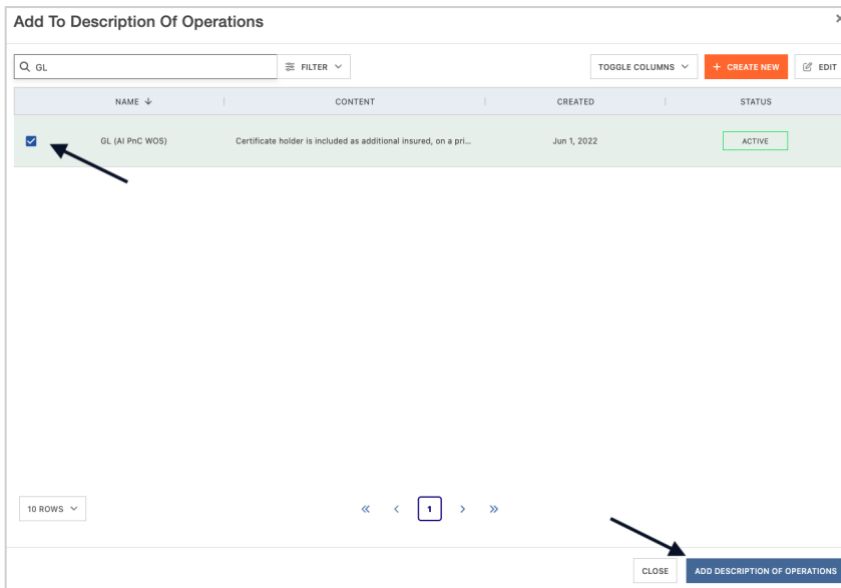
NAME ↓	CONTENT	CREATED	STATUS
<input type="checkbox"/> GL (AI PnC WOS)	Certificate holder is included as additional insured, on a pri...	Jun 1, 2022	ACTIVE

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

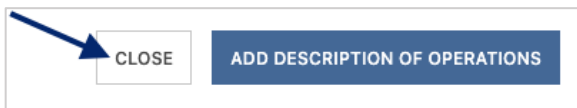


The screenshot shows the "Create Language" form. The "NAME" field contains "General Liability AI & WOS". The "CONTENT" field contains two paragraphs of text. The "SAVE" button is highlighted with an arrow.

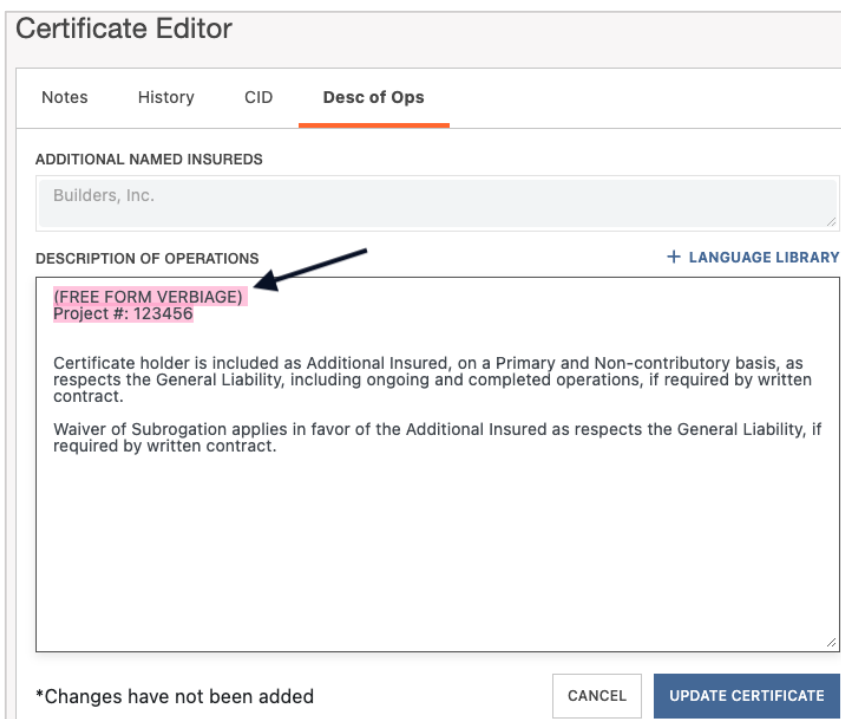
Once you have selected, revised, or added a template, ensure the template is checked and click “Add Description of Operations”.



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.



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 INSUREDS

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

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:

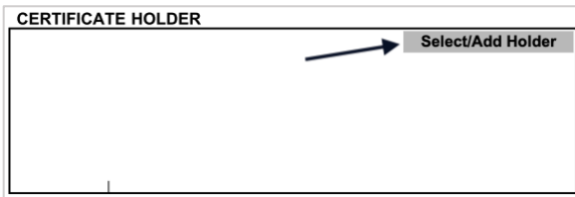
ADDITIONAL REMARKS [Edit Description of Operations](#)

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: _____ **FORM TITLE:** _____

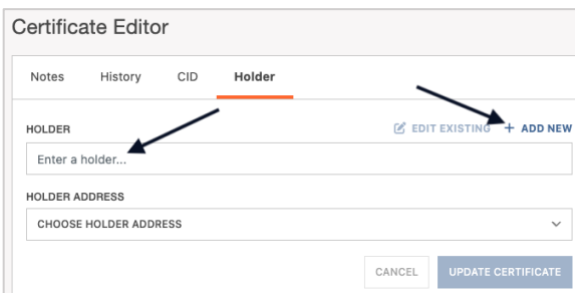
Waiver of Subrogation applies in favor of the Additional Insured as respects the General Liability, if required by written contract.

Updating the Certificate Holder

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

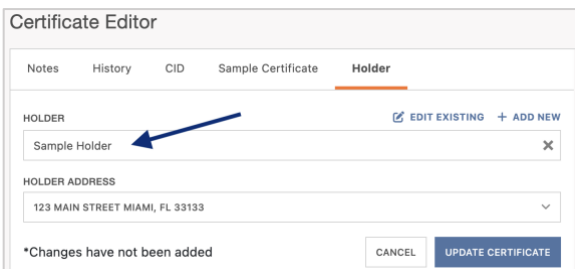


You can select any Holder that has historically been entered by your agency. You can also add a new Holder.

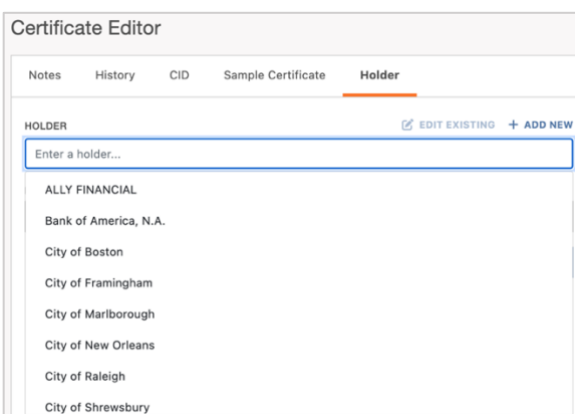


Selecting an Existing Holder

To select an existing Holder, click the Holder name.



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



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

The screenshot shows the 'Certificate Editor' interface with the 'Holder' tab selected. A dropdown menu is open under the 'HOLDER' section, showing 'SAMPLE Holder' as the selected option. Below the dropdown, there is a 'Sample Holder' label and a 'HOLDER ADDRESS' field. At the bottom, there are 'CANCEL' and 'UPDATE CERTIFICATE' buttons.

Once you have selected the Holder, you can choose to show the address 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 'HOLDER' dropdown is set to 'Sample Holder'. The 'HOLDER ADDRESS' dropdown is open, showing '123 MAIN STREET MIAMI, FL 33133' as the selected address. A black arrow points to this address. At the bottom, there is a message '*Changes have not been added' and 'CANCEL' and 'UPDATE CERTIFICATE' buttons.

Edit an Existing Holder

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

The screenshot shows the 'Certificate Editor' interface with the 'Holder' tab selected. The 'HOLDER' dropdown is set to 'Sample Holder'. A black arrow points to the 'EDIT EXISTING' button next to the dropdown. At the bottom, there is a message '*Changes have not been added' and 'CANCEL' and 'UPDATE CERTIFICATE' buttons.

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 screenshot shows the 'Edit Holder' form. The 'NAME' field contains 'Sample Holder - EDIT', with a black arrow pointing to it. Below the name field, there are fields for 'ADDRESS LINE 1', 'ADDRESS LINE 2', 'ADDRESS LINE 3', 'CITY STATE ZIPCODE', and 'COUNTRY'. The 'ADDRESS LINE 1' field contains '123 Main Street', 'CITY STATE ZIPCODE' contains 'Miami FL 33133', and 'COUNTRY' contains 'USA'. A black arrow points to the 'EDIT' button next to the 'COUNTRY' field. At the bottom, there are 'SHOW PREVIEW', 'CANCEL', and 'SAVE' buttons.

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

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

Create Holder ✕

NAME *
Sample Holder

ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	CITY STATE ZIPCODE	COUNTRY	
123 Main Street			Miami FL 33133	USA	<input type="button" value="EDIT"/> <input type="button" value="REMOVE"/>

Add a New Holder

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

Certificate Editor

Notes History CID **Holder**

HOLDER

Enter a holder...

HOLDER ADDRESS
CHOOSE HOLDER ADDRESS

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

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

CITY

Miami

COUNTRY

USA

STATE

FL

POSTAL CODE

33133

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

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 X

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”.



Certificate Editor

Notes History CID **Signature**

SIGNATURE

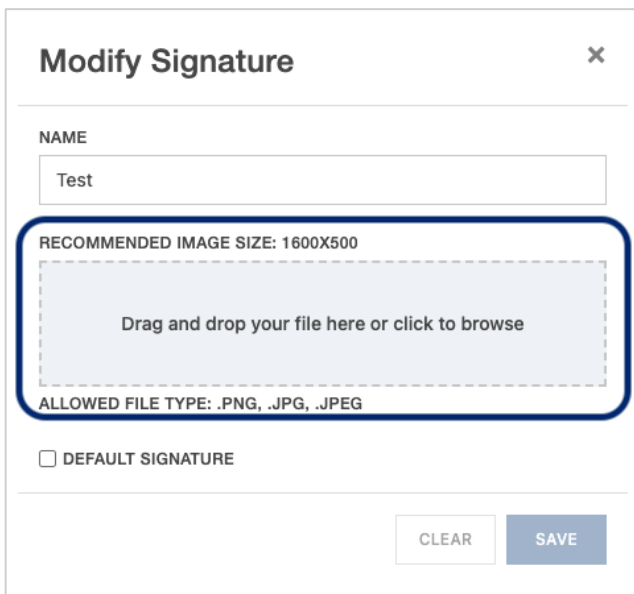
Test NV

*Changes have not been added

CANCEL UPDATE CERTIFICATE

Note: A blue arrow points from the 'EDIT EXISTING' button to the 'SIGNATURE' tab.

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: 1600X500

Drag and drop your file here or click to browse

ALLOWED FILE TYPE: .PNG, .JPG, .JPEG

DEFAULT SIGNATURE

CLEAR SAVE

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



Modify Signature

NAME

Test

Signature

DEFAULT SIGNATURE

CLEAR SAVE

Note: A blue arrow points to the 'SAVE' button.

Adding a New Signature

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



Certificate Editor

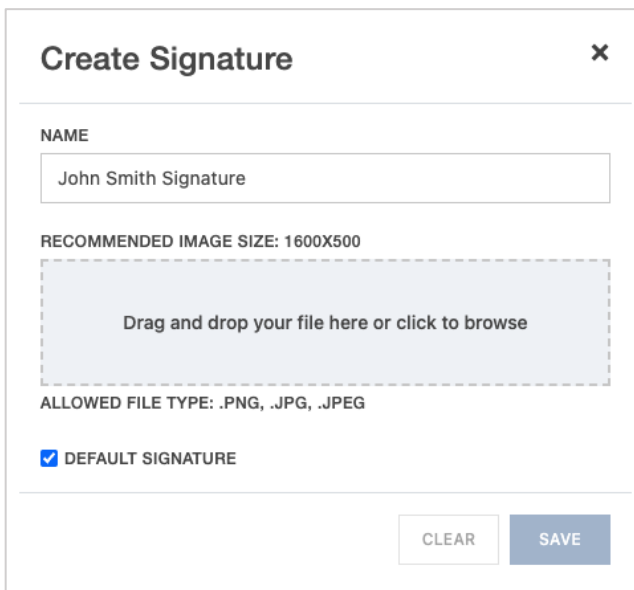
Notes History CID **Signature**

SIGNATURE [EDIT EXISTING](#) **+ ADD NEW**

Choose a signature...

You need to select a signature

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



Create Signature ×

NAME

John Smith Signature


RECOMMENDED IMAGE SIZE: 1600X500

Drag and drop your file here or click to browse

ALLOWED FILE TYPE: .PNG, .JPG, .JPEG

DEFAULT SIGNATURE

Then click “Save”.



Create Signature ×

NAME

John Smith Signature

Signature

DEFAULT SIGNATURE

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



The screenshot shows the 'Certificate Editor' interface with the 'Signature' tab selected. The interface includes tabs for 'Notes', 'History', 'CID', and 'Signature'. Below the tabs, there is a 'SIGNATURE' section with a text input field containing 'Test NV' and a close button 'X'. To the right of the input field are links for 'EDIT EXISTING' and '+ ADD NEW'. A blue arrow points from the input field to the 'UPDATE CERTIFICATE' button. Below the input field, there is a status message '*Changes have not been added' and two buttons: 'CANCEL' and 'UPDATE CERTIFICATE'.

The signature on the certificate has been updated:

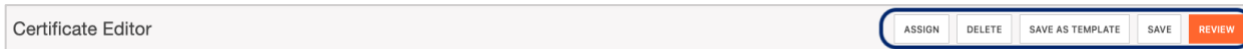


The screenshot shows the 'AUTHORIZED REPRESENTATIVE' section. It features a 'Sign Here' button on the left and a stylized signature 'Signature' on the right.

Completing the Certificate

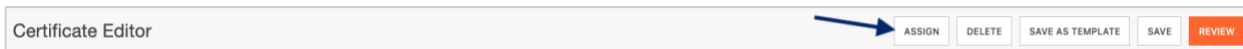
Once you have completed the creation of your certificate, there are several next options you can take. Across the top of the Certificate Editor, you will find the Editor Action buttons:

- 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.



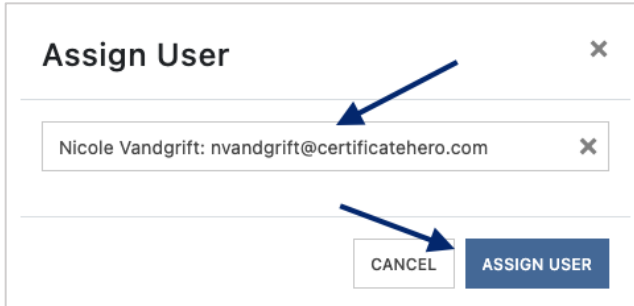
Assigning the Certificate

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



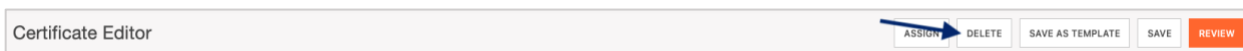
Search for and select the team member the certificate needs to be assigned to and click “Assign User”.

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

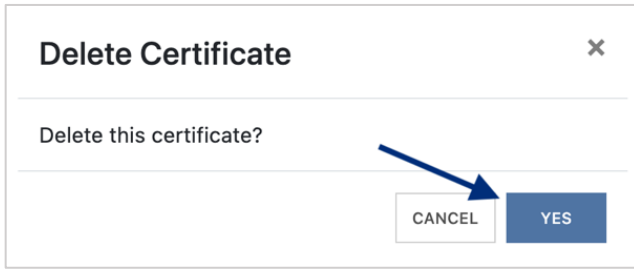


Deleting a Certificate in Progress

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



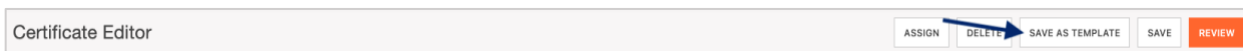
The system will prompt you to confirm if you wish to delete. Click “Yes” to proceed with the deletion.



A dialog box titled "Delete Certificate" with a close button (X) in the top right corner. The main text asks "Delete this certificate?". At the bottom, there are two buttons: "CANCEL" and "YES". A blue arrow points to the "YES" button.

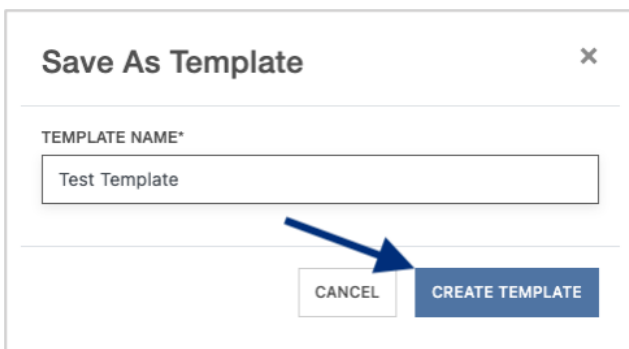
Saving as a Certificate Template

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



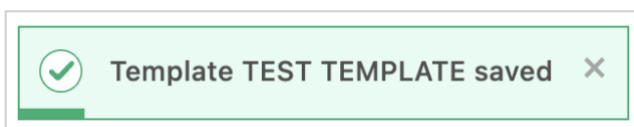
A horizontal toolbar for the "Certificate Editor". It contains five buttons: "ASSIGN", "DELETE", "SAVE AS TEMPLATE", "SAVE", and "REVIEW". A blue arrow points to the "SAVE AS TEMPLATE" button.

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



A dialog box titled "Save As Template" with a close button (X) in the top right corner. It has a text input field labeled "TEMPLATE NAME*" containing the text "Test Template". At the bottom, there are two buttons: "CANCEL" and "CREATE TEMPLATE". A blue arrow points to the "CREATE TEMPLATE" button.

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.

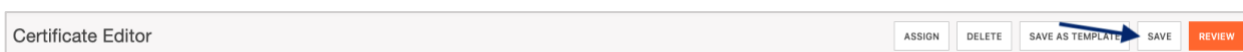


A green confirmation message box with a checkmark icon on the left. The text reads "Template TEST TEMPLATE saved" followed by a close button (X).

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.



A horizontal toolbar for the "Certificate Editor". It contains five buttons: "ASSIGN", "DELETE", "SAVE AS TEMPLATE", "SAVE", and "REVIEW". A blue arrow points to the "SAVE" button.

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
Dec 29, 2023	IN PROGRESS	4581613	---	TEST NAMED INS...	TEST HOLDER	AUTO, GL, UMB, ...	25	0	<div style="border: 1px solid black; padding: 2px;"> x </div> <ul style="list-style-type: none"> View Edit Delete

Reviewing the Certificate

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

Certificate Editor

ASSIGN DELETE SAVE AS TEMPLATE SAVE REVIEW

From here, you can review the certificate you just created and prepare for distribution via email/fax.

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
 1/2/2024

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 endorsements.

PRODUCER YOUR AGENCY HERE Address Line 1 Address Line 2 City, State Zip	CONTACT NAME: Agency Contact PHONE: (555) 555-5555 FAX: (555) 555-4444 E-MAIL: agencycontact@agencyemaildomain.com ADDRESS:
--	---

INSURER Named Insured 123 Main Street Anywhere, CA 90210	INSURERS AFFORDING COVERAGE INSURER A: CNA Insurance Companies NAIC # 35127 INSURER C: INSURER E: INSURER F:
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COVERAGES **CERTIFICATE NUMBER:** 2638 **REVISION NUMBER:**

LINE	TYPE OF INSURANCE	INSURANCE	POLICY NUMBER	ISSUE DATE (MM/DD/YYYY)	EXPIRATION DATE (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"/> PER <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:	GL9120	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED \$ 50,000 MED EXP (per person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000	
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED <input type="checkbox"/> SCHEDULED <input type="checkbox"/> AUTO-ONLY <input type="checkbox"/> AUTO <input type="checkbox"/> NON-OWNED <input type="checkbox"/> HIRED <input type="checkbox"/> AUTO-ONLY <input type="checkbox"/> AUTO-ONLY	CAU9120	09-01-2020	09-01-2021	COMBINED SINGLE LIMIT \$ 1,000,000 BODILY INJURY (per person) \$ BODILY INJURY (per accident) \$ PROPERTY DAMAGE \$ OF THE INSURER \$	
A	<input checked="" type="checkbox"/> UMBRELLA LMB <input checked="" type="checkbox"/> EXCESS LMB <input type="checkbox"/> DEF. <input type="checkbox"/> RETENTION \$	EXCESS9120	09-01-2020	09-01-2021	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000	
A	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS LIABILITY ANY/PHYSICIAN/PARTNER/RESERVE/EXECUTIVE (Mandatory in NY) If yes, describe above DESCRIPTION OF OPERATIONS below	OOSWC9120	09-01-2020	09-01-2021	<input checked="" type="checkbox"/> PER <input type="checkbox"/> DIS- <input type="checkbox"/> STATUTE <input type="checkbox"/> EPL E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. 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 <div style="text-align: center;">Certificate Hero</div>
--	---

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ADDITIONAL REMARKS SCHEDULE

AGENCY CUSTOMER ID:
LOC #:
 Page 2 of 2

<small>AGENCY</small> YOUR AGENCY HERE	<small>NAMED INSURED</small> Named Insured
<small>POLICY NUMBER</small>	<small>CARRIER</small>
<small>HAC CODE</small>	<small>EFFECTIVE DATE:</small>

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.

SPECIEMEN

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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 any verbiage needed for the email body.
- Mark whether the certificate needs to be deactivated after issuance.

The screenshot shows the 'Email' form interface. At the top, there are tabs for 'Email' and 'Fax'. The form includes fields for 'TO' (containing 'testemail@testemaildomain.com'), 'CC', 'BCC', and 'SUBJECT' (containing 'Test Certificate'). Below these is a 'BODY' field with the text 'Hello, Please see the attached and send confirmation of receipt.' and a '+ LANGUAGE LIBRARY' link. There is an 'ATTACH A FILE (OPTIONAL)' section with a dashed border and the text 'Drag and drop your file here or click to browse'. Below this, it lists 'ALLOWED FILE TYPE: .JPG, .JPEG, .TXT, .DOCX, .CSV, .PDF'. At the bottom, there is a checkbox labeled 'Mark certificate as inactive' and three buttons: 'COMPLETE', 'COMPLETE & DOWNLOAD', and '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.

The screenshot shows the 'Fax' form interface. At the top, there are tabs for 'Email' and 'Fax'. The form includes fields for 'FAX NUMBER' (containing '(555) 555-5555'), 'NAME' (containing 'John Smith'), 'SUBJECT' (containing 'Test Certificate of Insurance'), and a text area for additional information (containing 'Please see the attached certificate of insurance.'). Below these is an 'ATTACH A FILE (OPTIONAL)' section with a dashed border and the text 'Drag and drop your file here or click to browse'. Below this, it lists 'ALLOWED FILE TYPE: .JPG, .JPEG, .TXT, .DOCX, .CSV, .PDF'. At the bottom, there is a checkbox labeled 'Mark certificate as inactive' and three buttons: 'COMPLETE', 'COMPLETE & DOWNLOAD', and 'COMPLETE & FAX'.

Certificate Issuance

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



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



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



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

