

Table of Contents

STARTING THE RENEWAL 2

STEP 1 – CONFIRM CERTIFICATES..... 3

STEP 2 – RENEW POLICIES 4

IMPORT POLICY 5

RENEW A SINGLE POLICY 6

STEP 3 – RENEW PROFILES..... 7

STEP 4 – RENEW ENDORSEMENTS..... 9

STEP 5 – RENEW CERTIFICATE TEMPLATES..... 11

STEP 6 – RENEW CIDS..... 12

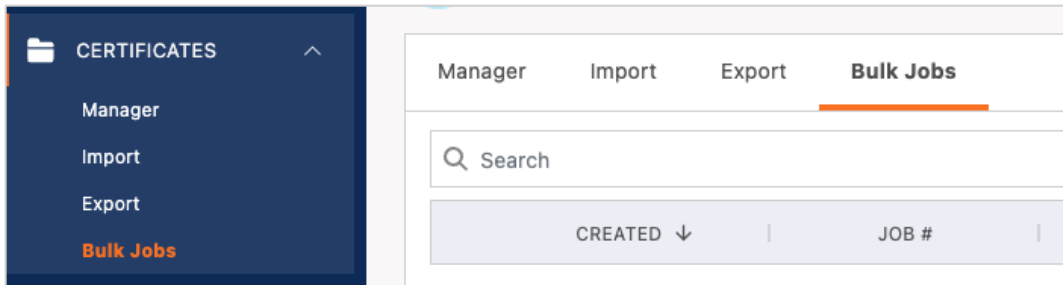
STEP 7 – UPDATE CERTIFICATES 13

ISSUING THE RENEWAL CERTIFICATES..... 16

EDIT OR CANCEL A RENEWAL IN PROGRESS..... 17

Starting the Renewal

To begin a renewal, drop down “Certificates” and click the “Bulk Jobs” option on the left, or “Bulk Jobs” tab within the Certificate Manager.



On the next screen, click the orange “+ Create Bulk Job” button.



You’ll receive a message advising you that it’s going to pull in only active, eligible certificates. You’ll also be notified that throughout the process you’re going to renew your associated policies, line of business profiles and endorsements.

Please Note: Only one renewal per insured at a time can be in progress.

Create Bulk Job

BULK JOB TYPE

REVISION

RENEWAL

NAME

Builders Inc. Renewal

When you create a renewal, all active certificates will be added. Associated policies, LOB profiles, and endorsements can also be renewed. Only one renewal can be in-progress at once for an insured.

ELIGIBLE CERTIFICATES: 105

After clicking “Start Renewal”, you’ll see each future step across the top, highlighting the step you’re currently on.

Step 1 – Confirm Certificates

The first step will confirm the certificates you are renewing.

Any active certificates being issued with the renewal will display here.

1 CONFIRM CERTIFICATES
2 RENEW POLICIES
3 RENEW PROFILES
4 RENEW ENDORSEMENTS
5 RENEW CERTIFICATE TEMPLATES
6 RENEW CIDS
7 UPDATE CERTIFICATES
NEXT >

Confirm Selected Certificates

You can remove certificates you do not wish to renew.

<input type="checkbox"/>	ISSUES	CERT #	CREATED ↓	NAMED IN...	HOLDER	DESCRIPTION OF OPERATIONS	EMAIL	FAX	SUMMARY	ENDORSEME...	ACTIONS
<input type="checkbox"/>	✓	3035	Feb 6, 2024	ABC Cons...	City of Ma...	Job 12-0991	kcollins@c...	–	GL	1	...
<input type="checkbox"/>	✓	3030	Feb 6, 2024	ABC Cons...	Constructi...	–	–	–	GL, UMB, ...	1	...
<input type="checkbox"/>	✓	3033	Feb 6, 2024	ABC Cons...	City of Ne...	RE: Work Permit30 day notice of ...	kcollins@c...	–	GL, WC	1	...
<input type="checkbox"/>	✓	3029	Feb 6, 2024	ABC Cons...	City of Shr...	–	–	–	GL, UMB, ...	1	...
<input type="checkbox"/>	✓	3034	Feb 6, 2024	ABC Cons...	University ...	RE: Event in May30 day notice of...	–	–	GL, UMB, ...	1	...
<input type="checkbox"/>	✓	3031	Feb 6, 2024	ABC Cons...	City of Shr...	–	–	–	GL, UMB, ...	1	...
<input type="checkbox"/>	✓	3032	Feb 6, 2024	ABC Cons...	Constructi...	–	–	–	GL, UMB, ...	1	...

Most of the time this will just be a confirmation step.

However, if a certificate clean-up has not yet taken place, or a certificate was missed during clean up, you can do that from here prior to moving forward with the renewal, within the Actions menu on the far right.

ENDORSEME...	ACTIONS
1	...
1	<input type="button" value="X"/> <input type="button" value="v"/>
	<div style="border: 1px solid gray; padding: 5px; width: fit-content;"> <p>View</p> <p>Remove From Renewal</p> </div>
1	...

Click “Next” to continue to the next step.

NEXT >

Step 2 – Renew Policies

Step two will bring you in to renew your policies.

This section will *display any policy that is displayed on at least one certificate* that was pulled into the renewal.

The screenshot shows a web interface for renewing policies. At the top, there is a navigation bar with steps 1 through 7. Step 2, 'RENEW POLICIES', is highlighted. Below the navigation bar, the title 'Renew Policies' is followed by a brief instruction: 'Select the new policies you would like to link the current policies to via the dropdown. Lines of Businesses associated with the current policy will be linked automatically.' Below this is a search bar with the text 'Search 3 policies' and a 'FILTER' button. To the right is a 'TOGGLE COLUMNS' button. The main content is a table with the following data:

NAME	LINE OF BUSINESS	POLICY #	CERTS	EFFECTIVE DATE	EXPIRATION DATE ↑	LINK NEW POLICIES
20-21 CUB	Umbrella/Excess Liability	CUB040102020	10	Apr 1, 2020	Apr 1, 2021	SELECT UMB POLICY
20-21 GL	General Liability	GL04012020	12	Apr 1, 2020	Apr 1, 2021	SELECT GL POLICY
20-21 WC	Worker's Compensation	WC04012020	11	Apr 1, 2020	Apr 1, 2021	SELECT WC POLICY

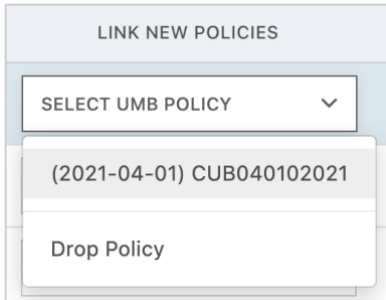
On the left, you will see the expiring policies.

NAME
20-21 CUB
20-21 GL
20-21 WC

On the right, you will see the option to link the renewal policies to replace the expiring policies.

This image shows a close-up of the 'LINK NEW POLICIES' section from the screenshot above. It consists of three vertically stacked dropdown menus, each with a downward-pointing chevron icon on the right side. The first dropdown is labeled 'SELECT UMB POLICY', the second is 'SELECT GL POLICY', and the third is 'SELECT WC POLICY'.

Click the policy dropdown and select the renewal policy.



LINK NEW POLICIES

SELECT UMB POLICY ▼

(2021-04-01) CUB040102021

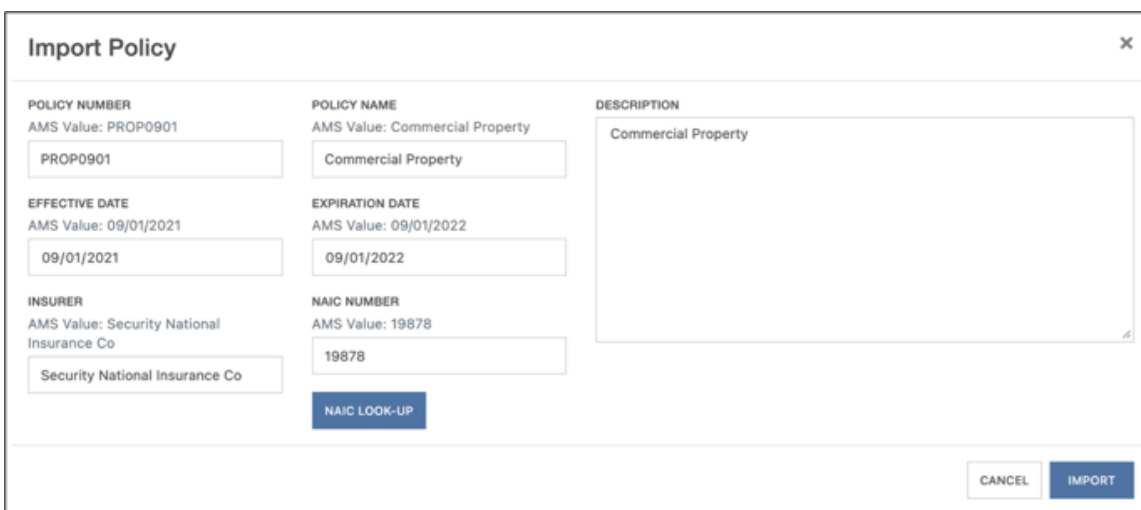
Drop Policy

If the policy is not being renewed and no longer needs to be shown on the certificates, during this step of the renewal flow, you can click “Drop Policy”. This will remove the policy from the certificates it is referenced on while still allowing you to proceed with renewing the rest of the policies.

Import Policy

If you do not see the renewal policy readily available, it may need to be imported from your AMS. This can be done within this same dropdown menu.

In the "Link New Policies" dropdown, select the policy to import. You will then be prompted to confirm the Policy details. In some cases, you may have to enter the NAIC Number (using the “NAIC Look-Up” button). When ready to import, click “Import”.



Import Policy [X]

POLICY NUMBER AMS Value: PROP0901 PROP0901	POLICY NAME AMS Value: Commercial Property Commercial Property	DESCRIPTION Commercial Property
EFFECTIVE DATE AMS Value: 09/01/2021 09/01/2021	EXPIRATION DATE AMS Value: 09/01/2022 09/01/2022	
INSURER AMS Value: Security National Insurance Co Security National Insurance Co	NAIC NUMBER AMS Value: 19878 19878	

NAIC LOOK-UP

CANCEL IMPORT

The policy will now appear available and selected in the "Link New Policies" menu.

Repeat this step for each renewing policy.

LINK NEW POLICIES

21-22 CUB (CUB040102021) ▾

21-22 GL (GL040102021) ▾

21-22 WC (WC040102021) ▾

Renew a Single Policy

In the event that only **one** Policy needs to be renewed during the renewal flow (i.e., when one policy is up for renewal with a different renewal date than the rest), you will only select the renewal policy from the "Link New Policies" drop down for the applicable policy.

LINK NEW POLICIES

SELECT UMB POLICY ▾

(2021-04-01) CUB040102021

Drop Policy

The remaining policies do not need action taken, and you can proceed with the renewal flow.

NAME	LINE OF BUSINESS	POLICY #	CERTS	EFFECTIVE DATE	EXPIRATION DATE	LINK NEW POLICIES
Umbrella(C)	Umbrella(C)	UMB03212019	45	Mar 21, 2021	Mar 21, 2022	UMBRELLA(C) (UMB03212... ▾
Business Auto	Business Auto	CA564054	45	Apr 1, 2021	Apr 1, 2022	SELECT AUTO POLICY ▾
Workers Compensation	Workers Compensation	WC5354630854365	45	May 1, 2021	May 1, 2022	SELECT WC POLICY ▾
General Liability	General Liability	GL53430455	45	May 1, 2021	May 1, 2022	SELECT GL POLICY ▾

At this point, only the certificates with this one renewing policy will be renewed. If the single renewing policy is not referenced on any other certificates, those will not be touched for this renewal.

Please Note: The renewal policy information is pulled from your Agency Management System (AMS). If you have renewal policy information entered in your AMS, you'll see the future policy to link for the renewal in Certificate Hero due to the integration with your AMS.

Click "Next" to continue to the next step.

NEXT >

Step 3 – Renew Profiles

Step three will renew the Line of Business (LOB) profiles.

Because Certificate Hero knows which certificates were expiring, the system also knows what the expiring LOB profiles are.

Assuming nothing changed, Certificate Hero will take the expiring LOB profiles and make a copy of them, referencing the renewal policies.

The screenshot shows the 'Renew LOB Profiles' interface. At the top, there is a navigation bar with steps 1 through 7. Step 3, 'RENEW PROFILES', is highlighted. Below the navigation bar, the title 'Renew LOB Profiles' is displayed, followed by a note: 'Any LOB profiles tied to policies that were mapped in the previous step can be renamed, replaced, or edited.' There is a search bar with 'Search 3 profiles' and a 'FILTER' dropdown. Below the search bar is a table with the following columns: NAME, PRIOR POLICY, LOB SYMBOL, ACORD FORM, LOB TYPE NAME, RENEWAL POLI..., CERTS, PROCESSED, and LINK NEW LOB. The table contains three rows of data:

NAME	PRIOR POLICY	LOB SYMBOL	ACORD FORM	LOB TYPE NAME	RENEWAL POLI...	CERTS	PROCESSED	LINK NEW LOB
2020 GL (1)	20-21 GL	GL	25	General Liability	21-22 GL	12	X	2021 GL (1) EDIT
2020 CUB (1)	20-21 CUB	UMB	25	Umbrella/Exces...	21-22 CUB	10	X	2021 CUB (1) EDIT
2020 WC (1)	20-21 WC	WC	25	Worker's Comp...	21-22 WC	11	X	2021 WC (1) EDIT

If there were changes to the limits from the expiring term, Certificate Hero will bring attention to anything needing review within the “Processed” column, indicating with a **red X**.

Click “Edit” to enter the LOB profile and review what changed.

This is a close-up view of the 'PROCESSED' and 'LINK NEW LOB' columns from the table in the previous screenshot. It shows three rows, each with a red 'X' in the 'PROCESSED' column and a dropdown menu in the 'LINK NEW LOB' column. The dropdown menus are set to '2021 GL (1)', '2021 CUB (1)', and '2021 WC (1)' respectively. Each row also has an 'EDIT' button to the right of the dropdown menu.

PROCESSED	LINK NEW LOB
X	2021 GL (1) EDIT
X	2021 CUB (1) EDIT
X	2021 WC (1) EDIT

In the example below, the renewal limits increased from \$1M/\$2m to \$2m/\$4m.

You can decide if you want the limits within the LOB profiles to remain as they previously displayed for the renewal. Or, if you would like to pull the renewing limits, click the button under “Revert?” to apply the new limits.

To continue, click “Confirm”.

Edit LOB Profile ✕

Some differences have been detected between the values attached to the new policy in the AMS, and the values in the LOB Profile.

Please confirm changes:

Coverage	AMS Value	LOB Profile Value	Revert?
Each Occurrence Limit	\$ 2,000,000	<input type="text" value="1,000,000"/>	<input type="button" value="↺"/>
General Aggregate Limit	\$ 4,000,000	<input type="text" value="2,000,000"/>	<input type="button" value="↺"/>
Personal & Advertising Limit	\$ 2,000,000	<input type="text" value="1,000,000"/>	<input type="button" value="↺"/>
Products - Comp/Op Aggregate Limit	\$ 4,000,000	<input type="text" value="2,000,000"/>	<input type="button" value="↺"/>

Certificate Hero will prompt for you to review the LOB profiles, regardless of if any were made.

After reviewing, click “Save”.

Edit LOB Profile ✕

ACORD FORM

POLICY

LOB TYPE

LOB TYPE NAME

PROFILE NAME

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

AMS Value: Not Found

AMS Value: Unchecked
 PER LOCATION

AMS Value: Unchecked
 PER PROJECT

AMS Value: Not Found

[+ ADD OVERFLOW COVERAGE](#)

AMS Value: 2,000,000

AMS Value: 50,000

AMS Value: 5,000

AMS Value: 2,000,000

AMS Value: 4,000,000

AMS Value: 4,000,000

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*.

Once you have resolved any issues in this step, the processed column will update with a **green checkmark**.

PROCESSED	LINK NEW LOB	
✓	2021 GL (1) ▼	EDIT
✓	2021 CUB (1) ▼	EDIT
✓	2021 WC (1) ▼	EDIT

Click “Next” to continue to the next step.



Step 4 – Renew Endorsements

Step four will take you in to renew your endorsements.

Like the previous step, assuming nothing change, Certificate Hero will make a copy of your expiring endorsement for the renewing term.

If nothing changed, this also becomes a confirmation step, and you can move along the process.

 A screenshot of a web application interface for "Renew Endorsements". At the top, there is a progress bar with seven steps: 1. CONFIRM CERTIFICATES, 2. RENEW POLICIES, 3. RENEW PROFILES, 4. RENEW ENDORSEMENTS (highlighted in orange), 5. RENEW CERTIFICATE TEMPLATES, 6. RENEW CDS, and 7. UPDATE CERTIFICATES. A "NEXT >" button is on the right. Below the progress bar, the heading "Renew Endorsements" is followed by a brief instruction: "To renew endorsements, you may choose to replace it with an existing one from the dropdown menu. Or from the actions menu, you can clone, drop, or create a new endorsement." There is a search bar with "Search 2 endorsement" and a "FILTER" dropdown. Below this is a table with columns: NAME, PRIOR POLICY, CERTS, RENEWAL POLICY, and REPLACE ENDORSEMENT. Two rows of data are shown.

NAME	PRIOR POLICY	CERTS	RENEWAL POLICY	REPLACE ENDORSEMENT
2020 CGD604 02-19 OnComps Arising ...	20-21 GL	10	21-22 GL	2021 CGD604 02-19 ONCO... ▼
2020 CGD316 02-19 WOS Blanket (1)	20-21 GL	2	21-22 GL	2021 CGD316 02-19 WOS B... ▼

However, if something did change resulting in the need to update the endorsement, click the dropdown under the “Replace Endorsement” column and click “Create New Endorsement”.

RENEWAL POLICY | REPLACE ENDORSEMENT

21-22 GL

2021 CGD604 02-19 ONCO... ▾

21-2

New! Create New Endorse...

2021 CGD604 02-19 OnComps Arising Blanket (1)

2021 CGD316 02-19 WOS Blanket (1)

Drop Endorsement

On the next screen, click “Select Endorsement Form”.

In order to create an endorsement, you must select the form that the endorsement will implement

SELECT ENDORSEMENT FORM

You can either create a new endorsement form or locate and select an existing endorsement form. After selecting your endorsement form, click “Select Endorsement Form”.

Endorsement Form

Search 9 Forms FILTER TOGGLE COLUMNS + CREATE ENDORSEMENT FORM

CREATED ↓	NAME	FORM NUMBER	EDITION DATE	LOB TYPE	POLICIES AVAILABLE
<input type="checkbox"/>	Oct 17, 2023	Waiver of Transfer of Right...	CG2404	May 2009	General Liability ✓
<input type="checkbox"/>	Apr 26, 2023	CGD316 - with coverages	CGD316	Feb 2019	General Liability ✓
<input checked="" type="checkbox"/>	Apr 26, 2023	CG604 - with coverages	CGD604	Feb 2019	General Liability ✓
<input type="checkbox"/>	Apr 21, 2023	CGD316 - coverages	CGD316	Feb 2019	General Liability ✓
<input type="checkbox"/>	Apr 21, 2023	Additional Insured - Engin...	CG2007	Apr 2013	General Liability ✓
<input type="checkbox"/>	Apr 21, 2023	CGD604 - Coverages	CGD604	Feb 2019	General Liability ✓
<input type="checkbox"/>	Apr 12, 2023	Additional Insured - Owner...	CG2010	Oct 2001	General Liability ✓
<input type="checkbox"/>	Feb 15, 2023	XTEND Endorsement For ...	CGD316	Feb 2019	General Liability ✓
<input type="checkbox"/>	Feb 15, 2023	Blanket Additional Insured ...	CGD604	Feb 2019	General Liability ✓

CANCEL **SELECT ENDORSEMENT FORM**

Because the policy associated with this endorsement was already renewed, that field will already be filled out.

Enter the new endorsement name and select to either use an existing endorsement form or upload your own. When complete, click “Save”.

The screenshot shows a form with the following fields and values:

FORM NAME: CG604 - with coverages	INSURANCE COMPANY: None Selected
FORM NUMBER: CGD604	EDITION DATE: February 2019
LINE OF BUSINESS: General Liability	COVERAGES: Additional Insured Blanket Completed Operations, Additional Insured Blanket Ongoing Operations

Below this is the ENDORSEMENT NAME section, containing a dropdown menu with '2021 CG604 - Sample' selected. To its right is a POLICY dropdown menu with '(2021-04-01) GL04012021 ...' selected. Below these is a DESCRIPTION text area with 'Description...' and an ENDORSEMENT FILE section with radio buttons for 'Use From Endorsement Form' (selected) and 'Upload Your Own'. At the bottom is an UPLOAD AN ENDORSEMENT FILE section with a dashed box containing 'Drag and drop your file here or click to browse' and 'ALLOWED FILE TYPE: .PDF'. At the very bottom are 'CANCEL' and 'SAVE' buttons. Blue arrows point from the text above to the ENDORSEMENT NAME dropdown, the POLICY dropdown, and the 'SAVE' button.

After making any applicable changes to the endorsements, click “Next” to continue to the next step.



Step 5 – Renew Certificate Templates

Step 5 will take you in to renew any certificate templates on file that contain one or more of the expiring policies.

The templates are comprised of policies, LOB profiles and endorsements that were already renewed in the three previous sections. So, Certificate Hero will again take any existing template and make a copy of them, referencing the renewal information.

Assuming nothing within your templates will have changed, this step will also become a confirmation step.

[← BACK](#)

 CONFIRM CERTIFICATES
 RENEW POLICIES
 RENEW PROFILES
 RENEW ENDORSEMENTS
 RENEW CERTIFICATE TEMPLATES
 RENEW CIDS
 UPDATE CERTIFICATES
 [NEXT >](#)

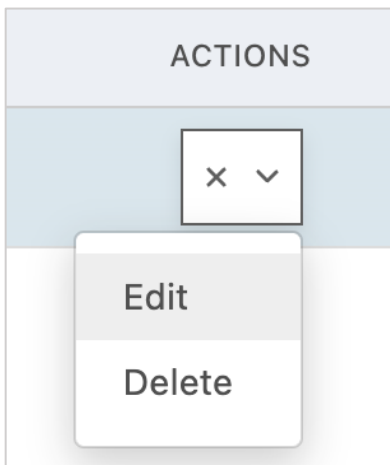
Renew Certificate Templates

Any certificate templates with mapped policies have been copied. You can edit the new templates here.

FILTER ▾
TOGGLE COLUMNS ▾

CREATED ↓	TEMPLATE NA...	NAMED INSUR...	ACORD FORM	DESCRIPTION ...	SUMMARY	EXPIRATION D...	NOTES	PROCESSED	ACTIONS	
<input type="checkbox"/>	Feb 6, 2024	MAINALL (Rene...	ABC Constructi...	25	—	GL, UMB, WC	Apr 1, 2022	Mapped lob pro...	✓	⋮

If you need to view or make changes to your templates, you can select edit within the Actions menu on the far right.



After making any applicable changes to the endorsements, click “Next” to continue to the next step.

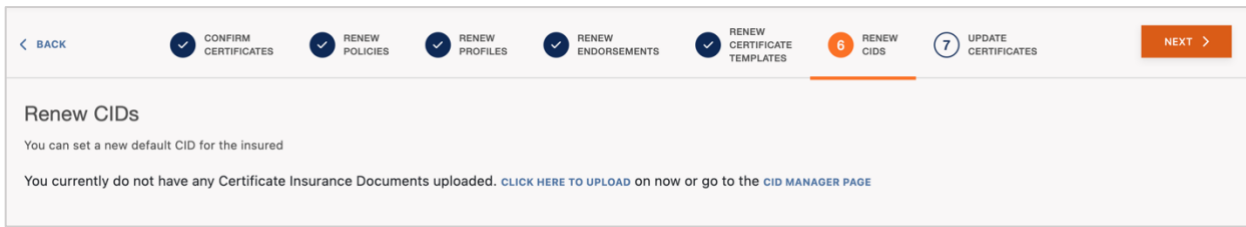


Step 6 – Renew CIDs

The sixth step will allow you to renew any Certificate Issuance Documents (CIDs) on file for the insured, if any are on file.

If you do not have a CID on file for the insure and need to add one, you can add it here by clicking “Click Here to Upload”.

If you do not utilize CIDs, the feature can be turned off for your agency, and this step will disappear for future renewals.



The screenshot shows a progress bar at the top with seven steps: CONFIRM CERTIFICATES, RENEW POLICIES, RENEW PROFILES, RENEW ENDORSEMENTS, RENEW CERTIFICATE TEMPLATES, RENEW CIDS (highlighted with an orange circle and underline), and UPDATE CERTIFICATES. A 'BACK' button is on the left and a 'NEXT >' button is on the right. Below the progress bar, the heading 'Renew CIDs' is followed by the text: 'You can set a new default CID for the insured' and 'You currently do not have any Certificate Insurance Documents uploaded. [CLICK HERE TO UPLOAD](#) on now or go to the [CID MANAGER PAGE](#)'.

Click “Next” to continue to the next step.



Step 7 – Update Certificates

The final step of the renewal flow will take you to review and issue your renewal certificates.

Most of the time at this stage, this step is another confirmation step, your renewal is complete, and you’re ready for issuance.

Update Certificates

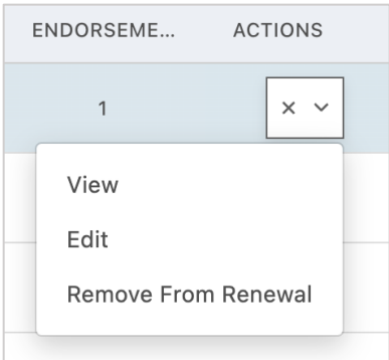
You can do edits on the certificate before you finish the renewal

Q Search 12 Certificates FILTER TOGGLE COLUMNS EDIT ALL

ISSUES	CERT #	CREATED ↓	NAMED IN...	HOLDER	DESCRIPTION OF OPERATIONS	EMAIL	FAX	SUMMARY	ENDORSEME...	ACTIONS
<input type="checkbox"/>	✓ 3035	Feb 6, 2024	ABC Cons...	City of Ma...	Job 12-0991	kcollins@c...	—	GL	1	...
<input type="checkbox"/>	✓ 3030	Feb 6, 2024	ABC Cons...	Constructi...	—	—	—	GL, UMB, ...	1	...
<input type="checkbox"/>	✓ 3033	Feb 6, 2024	ABC Cons...	City of Ne...	RE: Work Permit30 day notice of ...	kcollins@c...	—	GL, WC	1	...
<input type="checkbox"/>	✓ 3029	Feb 6, 2024	ABC Cons...	City of Shr...	—	—	—	GL, UMB, ...	1	...
<input type="checkbox"/>	✓ 3034	Feb 6, 2024	ABC Cons...	University ...	RE: Event in May30 day notice of...	—	—	GL, UMB, ...	1	...
<input type="checkbox"/>	✓ 3031	Feb 6, 2024	ABC Cons...	City of Shr...	—	—	—	GL, UMB, ...	1	...
<input type="checkbox"/>	✓ 3032	Feb 6, 2024	ABC Cons...	Constructi...	—	—	—	GL, UMB, ...	1	...

However, if additional certificate revisions are needed to prior to issuing the renewal, select the certificate to revise and click “Edit” within the Actions menu on the far right.

You can also remove a certificate if it is found to be no longer needed by clicking “Remove From Renewal”.



If a group of certificates need revisions prior to issuing the renewal, select the group of certificates requiring the change and select “Bulk Edit” within the “Batch Action(s)” dropdown.

ISSUES	CERT #	CREATED ↓	NAMED IN...	HOLDER	DESCRIPTION OF OPERATIONS	EMAIL	FAX	SUMMAR	ACTIONS
<input checked="" type="checkbox"/>	3035	Feb 6, 2024	ABC Cons...	City of Ma...	Job 12-0991	kcollins@c...	—	GL	...
<input checked="" type="checkbox"/>	3030	Feb 6, 2024	ABC Cons...	Constructi...	—	—	—	GL, UMB, ...	1 ...
<input checked="" type="checkbox"/>	3033	Feb 6, 2024	ABC Cons...	City of Ne...	RE: Work Permit30 day notice of ...	kcollins@c...	—	GL, WC	1 ...
<input checked="" type="checkbox"/>	3029	Feb 6, 2024	ABC Cons...	City of Shr...	—	—	—	GL, UMB, ...	1 ...
<input checked="" type="checkbox"/>	3034	Feb 6, 2024	ABC Cons...	University ...	RE: Event in May30 day notice of...	—	—	GL, UMB, ...	1 ...

This will open the Bulk Editor.

Locate the area within the bulk editor you need to revise and proceed with the revision.

When the required changes are made, click “Complete Bulk Edit” in the upper right corner.

Editing 5 Certificates

[← BACK TO RENEWAL](#)
RESET ALL
COMPLETE BULK EDIT

Named Insured

Line Of Business

Endorsements

Description of Operations

Holder

Signature

Contact

Emails

You can replace the Named Insured on the selected certificates

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

CHOOSE NAMED INSURED ▼

ADDITIONAL NAMED INSURED(S)

ADDITIONAL NAMED INSUREDS ▼

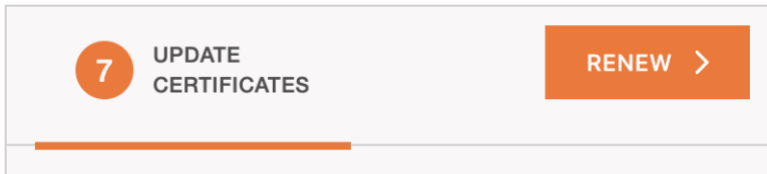
RESET SAVE EDITS

After reviewing the renewal certificates, you are ready to issue the certificates.

Issuing the Renewal Certificates

When you are ready to issue your certificates, you'll notice the "Next" button we were previously clicking in the upper right corner has now changed to "Renew".

To proceed with renewal issuance, click "Renew".

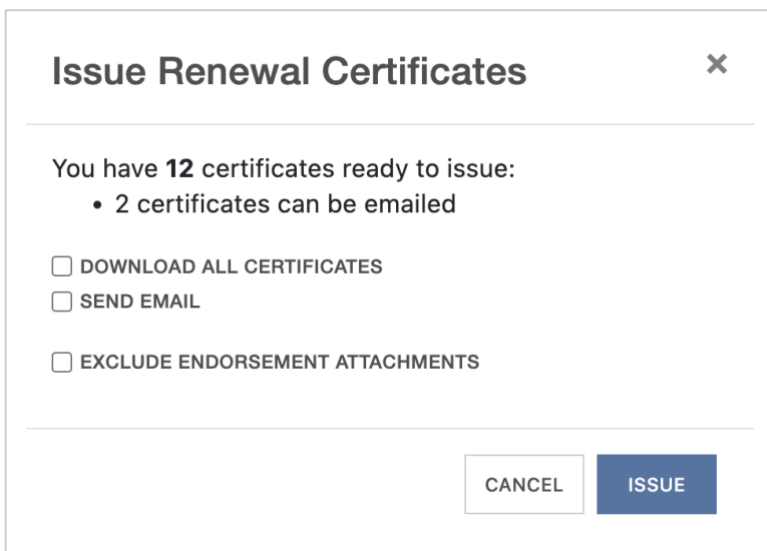


You will receive a prompt that indicates how many certificates are going to be issued.

If any certificates have distribution instructions that were added at mid-term issuance, this will be indicated in the prompt as well.

You'll also be asked if you want to download a copy of the certificates, send via email according to the mid-term distribution, and exclude the endorsement attachments.

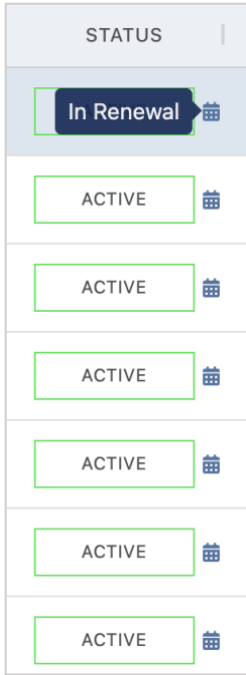
Click "Issue" to proceed with issuance.



This will generate your renewal certificates and you will be directed back to your Certificate Manager.

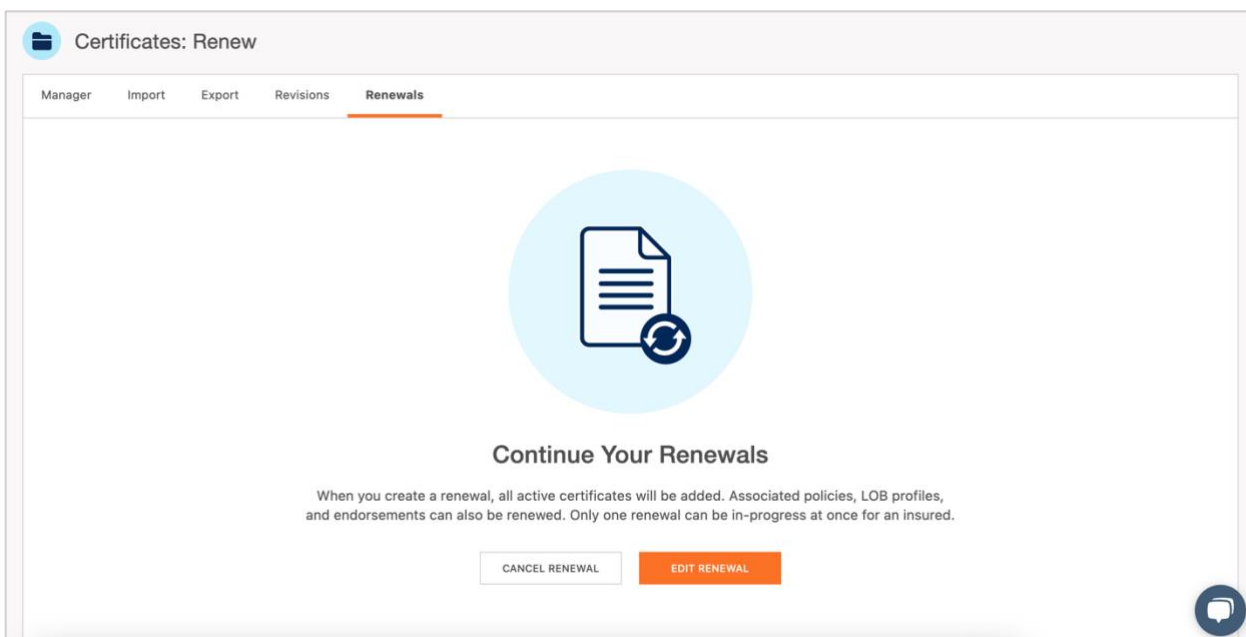
Edit or Cancel a Renewal in Progress

It was mentioned earlier that only one renewal per insured can be in progress. Within the Certificate Manager, a calendar icon will display on any certificates that are part of a renewal, indicating a renewal is in progress. Hovering over the icon will also advise of the renewal.



If you had to leave your renewal for any reason, you can return to your renewal the same way it was initially started.

Upon re-entering your renewal, you will be prompted to cancel the renewal if it is no longer needed, or to edit the renewal if you need to continue with the flow.



If you selected to cancel the renewal, you will receive a confirmation prompt.

Click “Yes” to proceed with cancelling the renewal and you will be brought back to your Certificate Manager.

Cancel Renewal? ✕

Are you sure you wish to cancel the renewal? All in progress data will be lost.
