Certificate of Insurance Instructions

1) From the Customer Services Menu, click "Certificate of Insurance." The Certificate Selection List will display.

2) Click on the name of the Certificate you wish to use. A view of the Certificate will display to confirm that you have selected the correct Certificate.

3) Click "Submit Request." Proceed to either of the following sections, based on if the Holder has been previously entered.

If the Holder has already been entered

1) Find the Holder from the Holder list.

2) Click "Copy" to the right of the Holder Description of Operations.

3) Enter the Description of Operations, and review the delivery information.

4) Move to the bottom of the screen, and click "Submit Request". Your certificate will now be delivered based on your instructions, and/or viewed on the screen.

Tip: To view/print Auto ID Cards and Certificates of Insurance, all recipients will need to:
- allow pop-ups from this site
- Install or update Adobe Acrobat Reader on your computer

To enter a new Holder

1) If your Certificate Holder is not on the list, click "Add". The Certificate holder/delivery screen will display.

2) Enter the Certificate Holder name, address and phone number.

3) Check the "Do they Receive Renewals" box. You will have an opportunity to review those checked at a later date.

4) Complete the "Description of Operations" section.

5) Enter your email address. If you would like to view/print the Certificate, click the "view on screen" box.

6) Enter the recipient information. You may enter up to 3 different recipients. Please remember that if a recipient's email address is entered, a renewal certificate can also be sent to that address.

7) Move to the bottom of the screen, and click "Submit Request". The Certificate will now be delivered based on your instructions, and/or viewed on the screen.

Reprint or Resend a Previously Issued Certificate of Insurance

1) Select "Certificates of Insurance" from the Service Menu.

2) Check the radio button "Previously Issued Certificates" in the Find section of the Certificate selection list.

3) From the list of previously issued Certificates, locate the certificate you are looking for.

4) Select the Certificate by clicking on the Certificate or Holder name.

5) Click "Submit Request" on the top left of the screen.

6) Update the delivery information if necessary. Please read popup blocker information below.

7) Click "Submit request."

The Certificate will automatically be sent to all recipients entered. Click on the "Certificate" link on the popup box to view a copy of the Certificate.

Popup Blocker: Please note that if "view on screen" is selected, you need to turn off your popup blocker before selecting "Submit Request."

Certificate Renewal Processing

1) From the Service Menu, select "Certificate Renewal."

2) Select "Update Holder Information" to review your list of holders, description of operations, and delivery information. Note: Holders included in this list are all holders that have had the "renewal" box checked off, and are assigned to a certificate template.

3) Determine which holders to renew by checking or un-checking the "Issue Cert" checkbox.

4) Review the delivery information. Delivery method & email addresses are pre-assigned to the original delivery information assigned when the Certificate Holder information was entered. The delivery information can be updated by clicking the "change" link.

5) After the holder list is reviewed, click "Send." This will send your changes/approval of your holders to your Agent.

After your Agent updates your policy information, a renewed Certificate of Insurance will automatically be sent to all Holders selected, which have an email address listed in the delivery information.