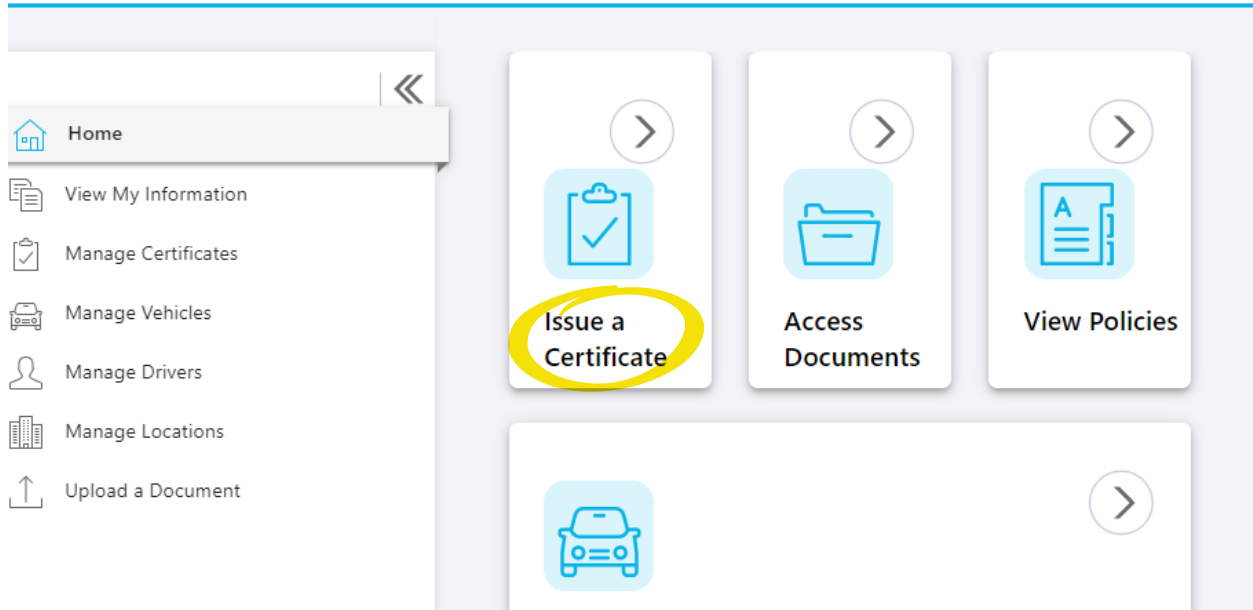
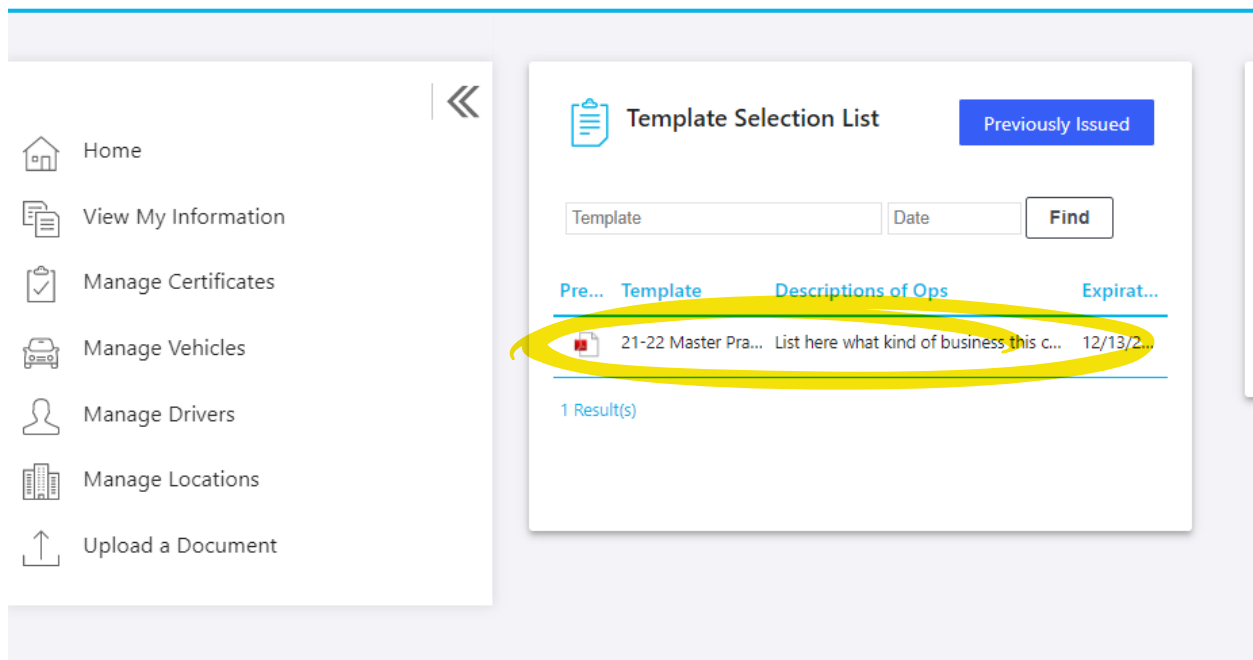


# Issuing Your Certificate of Insurance

Click the **Issue a Certificate** button on the home screen:



Click on one of the certificate template name from the list. (There may be only one template listed and the name may vary.)



On the **Select Holder** screen, use the search fields at the top (highlighted in green) to see if the holder is already on your list\* (highlighted in yellow)

The screenshot shows the 'Select Holder' interface. At the top, there are search fields for 'Name', 'Address', and 'Description of Ops', along with a 'Find' button. These fields are circled in green. Below the search fields is an 'Advanced Options' section. The main area displays a table of search results with columns: 'C...', 'Name', 'Address', 'Named Insured', and 'Description of Ops'. The first two rows are highlighted in yellow. The first row is 'Harry Levine ...' with address '7587 W. Sand Orlando, FL ...'. The second row is 'HLI' with address '7587 W. San... Orlando, FL ...'. A third row 'iug:dgf' is partially visible. At the bottom, it says '3 Result(s)'. An 'Add Holder' button is located in the top right corner.


C...	Name	Address	Named Insured	Description of Ops
	Harry Levine ...	7587 W. Sand Orlando, FL ...		
	HLI	7587 W. San... Orlando, FL ...		
	iug:dgf			

\*If the holder you want is *already* listed, click on the holder name to select it, then skip to Step 6.

If the holder is **not already** on your list, click the **Add Holder** button.

This screenshot is identical to the one above, but the 'Add Holder' button in the top right corner is circled in yellow. The search fields and results are not highlighted.

On the Add Holder page you will need to fill out the Name and Address for the holder requesting the certificate. You may check off the Receive Renewal or One Time Only box as it applies to your holder.

 **Add Holder**

---

▼ **Holder Information**

---

Name

**Address**

Line 1

Line 2

Line 3

Line 4

City

State/Province

Zip/Postal Code

Country

---

This certificate supersedes previously issued certificate

Yes

Do They Receive Renewals

---

Yes

One Time Only    Interest Ends

Loan Number

Summary

Group Code

---

▼ **Named Insured**

---

Explanation of fields shown above.

**Do they Receive Renewals:** Check this box if each year at renewal you want Harry Levine Insurance to send an updated certificate to this holder. This box defaults to be checked.

**One Time Only:** If this is the only time you will ever need to send a certificate to this holder, check this box. The "Date Interest Ends" field will pre-fill with today's date. After sending the certificate, the holder immediately becomes inactive and will no longer appear in the lists.

**Date Interest Ends, Loan Number, Summary and Group Code:** Not used at this time.

The **Recipient #1** section is for specifying who at the holder is to receive this certificate and how. (Putting your information in the recipient fields will result in you receiving duplicate copies and the holder receiving none.) If you need to send the certificate to more than one recipient, expand and fill out the Recipient #2 and or Recipient #3 sections.

Holder Specific Portion

▼ Recipient 1

Attention  
Your customer's contact name

Subject  
Proof of Insurance for Test Test

Message  
Please find attached the Certificate of Insurance as requested.

Email Current Cert

Email Renewal Cert

Email  
info@hlinsure.com

▶ Recipient 2

▶ Recipient 3

▼ Send a One Time Confirmation Copy

Email  
info@HLInsure.com

Send Me Confirmation

Once the recipient information has been input you can click the Send Me Confirmation button (highlighted in green) to receive a copy for your records. You should also click preview on the bottom left (highlighted in yellow, this will download a copy to your computer and show you the exact form your customer will be getting) to double check all information is correct. Note that if you preview you do not need to check the Send Me Confirmation button as you will already have a copy.

Click Submit button at the bottom right of the screen to send the certificate.

You should see confirmation of your send, and the ability to open the actual certificate. If you need to send multiple certificates you can click the Issue Another Certificate button.

