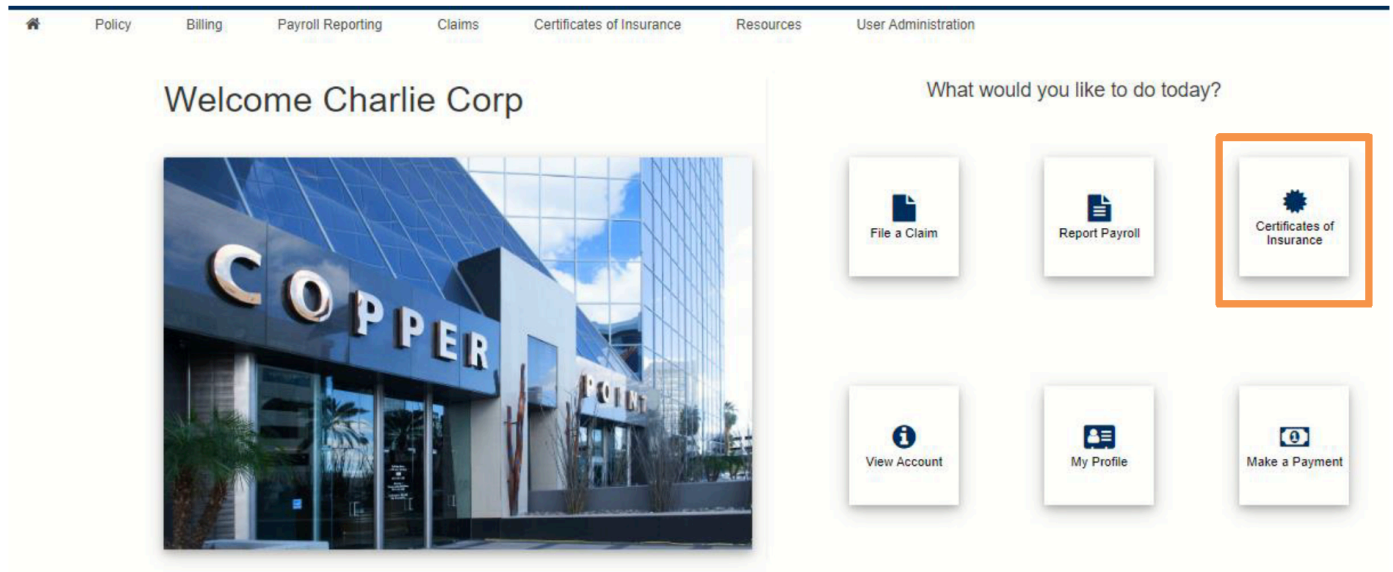


## Certificates of Insurance

To create certificates of insurance, registered user must have the Policy user permission. Click on the Certificates of Insurance tab at top or the quick link to access the certificates page.



The screenshot shows the CopperPoint user interface. At the top, a navigation bar contains several tabs: Home, Policy, Billing, Payroll Reporting, Claims, Certificates of Insurance (highlighted), Resources, and User Administration. Below the navigation bar, a welcome message reads "Welcome Charlie Corp" next to a photograph of a modern building with "COPPER POINT" signage. To the right, a section titled "What would you like to do today?" displays six action buttons: "File a Claim", "Report Payroll", "Certificates of Insurance" (highlighted with an orange border), "View Account", "My Profile", and "Make a Payment".

### CREATING CERTIFICATES

Policy #:  Policy Period:

On the Certificates page, select the appropriate policy number and policy period from the dropdown at top, then click the orange Create button.

(Please note that certificates can be generated only for workers' compensation policies. If there is no workers' compensation policy on the account, the Create button will be disabled.)

## Options

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Named Insured \*

- Charlie Corp
- Kilauea Crushers Inc
- Charlie Corp dba Kilauea Crushers Inc
- Posh Water Bottler
- Charlie Corp dba Posh Water Bottler

Off Duty Police Officer

Yes	<b>No</b>
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Job Number

Location

Complete the required fields to create the certificate. In the Options section, the named insured, additional named insured, or DBA can be selected, or a combination of those titles.

## Description of Operations

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### Arizona

0016 - FARM: ORCHARDS - ALL EMPLOYEES

### Colorado

0005 - FARM - TREE PLANTING - REFORESTATION

<b>Cancel</b>	Save
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Select for which states the certificate applies in Description of Operations, then click Save. The screen will refresh to the main Certificates of Insurance page with a blue informational banner confirmation.

## EDITING AND DOWNLOADING CERTIFICATES

The Certificates of Insurance page will open with a list of created certificates for the selected policy and term:

Policy #:  Policy Period:

[Create](#)

SELECT	HOLDER NAME	CERT #	NAMED INSURED	LOCATION	JOB #	WAIVER OF SUBROGATION
<input type="checkbox"/>	<a href="#">Frosty Snowman</a>	4	Charlie Corp	Mesa	4	
<input type="checkbox"/>	<a href="#">Boo Radley</a>	6	Charlie Corp dba Kilauea Crushers Inc	Mesa	6	
<input type="checkbox"/>	<a href="#">Nick Carraway</a>	12	Charlie Corp	Tempe	1	
<input type="checkbox"/>	<a href="#">Roger Maris</a>	13	Posh Water Bottler	Surprise	2	

[Remove](#) [Download All](#) [Download Selected](#)

This table can be sorted by its headers, so the list can be arranged by holder name, certificate number, named insured, location, or job number.

To view any certificate, use the checkbox in the left Select column and click Download Selected. Or, click the Download All button to save all in a zipped folder.

Certificates can be changed or deleted. To edit a certificate, click on the holder name (in blue), make the updates, and then click Save. To remove a certificate, use the checkbox in the Select column and click Remove. Once a certificate has been removed from the list, it cannot be retrieved.