



WORKING WITH CERTIFICATES



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The EZLynx certificate feature is flexible enough to accommodate the needs of any agency. Whether your agency creates just a few certificates or hundreds, our process is fast and easy. Simply create one Certificate Master, and use it to generate any number of individual certificates for multiple holders.

[Watch the Working with Certificates video](#) 16 min.

1. Setup Tasks

Before anyone in an agency uses the certificate feature, there are agency and user specific setup tasks to consider.

1.1 Create the Agency's Certificate Holders Master List (Agency)

The following time-saving task is completed by anyone in the agency. The Master Certificate Holder List makes adding holders to a Certificate Master much faster, which is helpful at "crunch-time".

To create the agency's Certificate Holders Master List:

1. Hover over **Settings icon**, select **Certificate Holders**.
2. Click **Add Certificate Holder**.
3. Enter the holder's information. Always **add an email address**.
4. **Remarks are tied to each individual holder.**
 - Remarks can be added now or, when adding the holder to a Certificate Master.
5. **Repeat steps 2 - 4** to add all of the agency's certificate holders.

1.2 Set Any Signature to Prefill the Certificate (Users)

It saves time to have the appropriate signature prefill certificates. Each EZLynx user can set any signature to prefill all of their ACORD forms, including certificates. Both producers and their CSRs can set the producer's signature. Even when the signature prefills, it can be edited on the certificate, if necessary.

To set any signature to prefill all ACORD forms created in EZLynx:

1. Hover over **Settings icon**, select **EZLynx Preferences**, and scroll down to **Signature**.
There are two options:
 - Set a **system generated** signature:
 - At **Enter New Signature**, **type the name** and click **Save**.
 - The system generates a signature.
 - Set a **true version** of the signature:
 - Click **Choose File** to upload a signature image, and click **Save**.
 - **EZTip:** These can be created using free programs found on the Internet.

1.3 Set a Different Agency Address to Prefill Certificates (Users)

All ACORD forms, including certificates, prefill with the address on the agency's EZLynx account. Sometimes a user wants only their own ACORD forms to prefill with a different address while leaving the address on file as is.

NOTE: To update the address for everyone in the agency, contact support@ezlynx.com.

To Prefill a User's ACORDs with a Different Address:

1. Hover over **Settings icon**, select **EZLynx Preferences**, and scroll down to **ACORD Forms**.
2. At **Use custom address on ACORD forms**, select **YES**, **enter the address** and click **Save**.

THE CERTIFICATE WORKFLOW

Are you ready to start creating certificates? You are going to love our process!

2. Ensure Policies are Available in EZLynx

One or more policies for different lines of business can be added to a certificate. Before creating a certificate, the policies must be available in EZLynx.

To check for policy(ies) in EZLynx:

1. Go to the **applicant's Overview tab**, and scroll down to the **Policies grid**.
2. Are the policies listed here?
 - a. If so, go to [Create a Certificate Master](#).
 - b. If not:
 - If a **downloading carrier**, wait for the policy to download or ask the carrier to send the download.
 - If a **non-downloading carrier**, add the policy manually.
 - Go to the applicant's **Overview tab**, and click **Add Policy**.
 - Enter the required policy information.
 - For the supported LOBs below, click the **Add & Edit Policy** button at lower right to enter comprehensive policy details, which will then prefill the certificate.

- | | | |
|-----------------------|------------------------|------------------|
| ➤ Personal Auto | Homeowners | Dwelling Fire |
| ➤ Commercial Auto | General Liability | Inland Marine |
| ➤ Commercial Property | Workers Comp | Garage & Dealers |
| ➤ Commercial Umbrella | Business Owners Policy | |

3. Create the Certificate Master

A Certificate Master is a template that is entirely completed, except the certificate holder field is blank. A list of holders, pulled from the [Master Company List](#), is added to the Certificate Master and is used to instantly create separate, individual certificates for each holder.

To create the Certificate Master:

1. Go to applicant's **Documents tab**.
2. At the upper right, click **Add** and select **Certificate**.
3. In the **Add Certificate box**:
 - a. **Select a certificate**.
 - b. At **Certificate Name**, rename the certificate if you'd like.
 - c. At **Merge Policy Information**, select the policy(ies).
 - If selecting more than one policy, they must be **different lines of business**.
 - d. Click **Add Certificate**.
4. The Certificate Master opens in the **EZLynx Editor**.
5. The Certificate Master is **prefilled with policy information**; but **all blue fields are editable**.
6. To **add or change the signature**, use the Pencil icon at the upper right.

Two options:

- a. Select a name from the Existing Signature dropdown, and click **Add Signature**.
- b. Or, type any name in the **New Signature** box, and click **Generate Signature**.

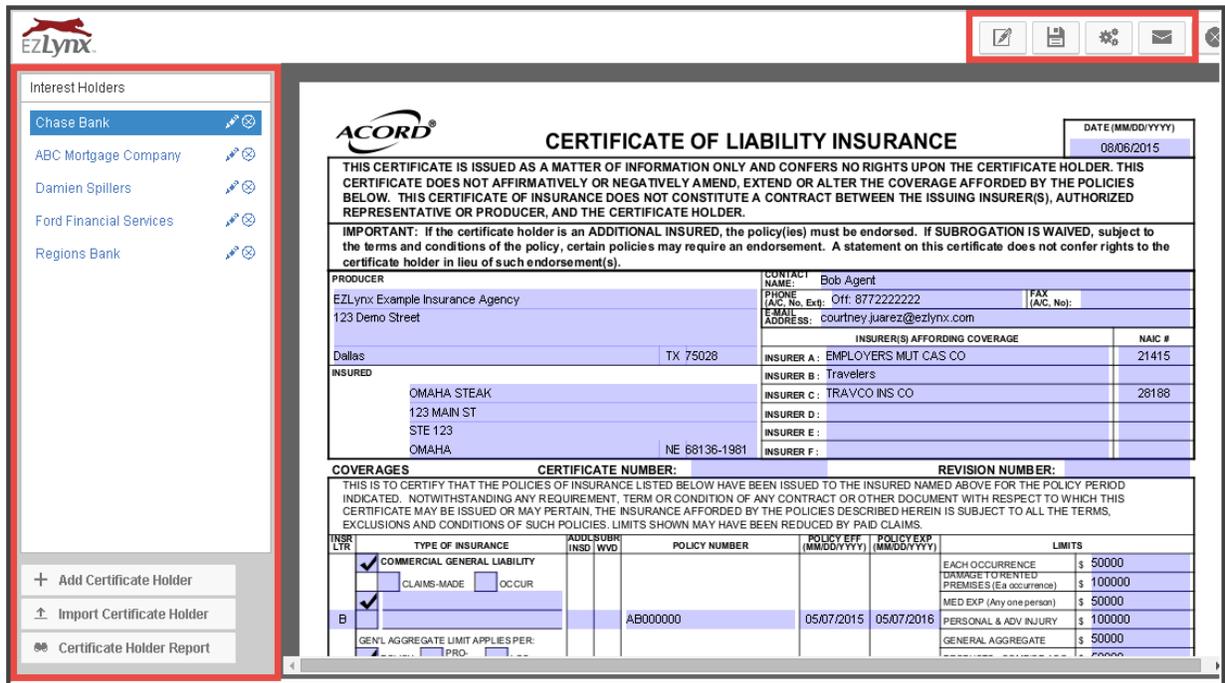
4. Add Holders to the Certificate Master

A Certificate Master has a unique area to add a list of the holders. Once added, you can have the system generate an individual certificate for each holder.

To add holders to the Certificate Master:

1. See the **holders area** at the top left of the Certificate Master.
2. Click **Add Certificate Holder**.
3. At the Name field, type the holder name – **the system searches for the holder in the [Certificate Holder Master List for a match](#)**; select the match.
 - a. If no match is found, enter the holder's information, and check the **Save to Master List** box. This action not only adds the holder to this Master Certificate, but also the Certificate Holder Master List for future use.
4. Click **Add Interest**; the holder is added to **Interest Holders** area at upper left. The Add Interest pane stays open, so you can add another holder.
5. **Repeat steps 3 & 4** until all holders are added, then **close the box**.

(see screenshot on next page)



ACORD **CERTIFICATE OF LIABILITY INSURANCE** DATE (MM/DD/YYYY) 08/06/2015

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 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).

PRODUCER: EZLynx Example Insurance Agency, 123 Demo Street, Dallas, TX 75028

CONTACT NAME: Bob Agent
PHONE (A.C. No. Excl. Off): 8772222222
FAX (A.C. No.):
EMAIL ADDRESS: courtney.juarez@ezlynx.com

INSURER(S) AFFORDING COVERAGE:

INSURER	NAIC #
INSURER A: EMPLOYERS MUT CAS CO	21415
INSURER B: Travelers	
INSURER C: TRAVCO INS CO	28188
INSURER D:	
INSURER E:	
INSURER F:	

INSURED: OMAHA STEAK, 123 MAIN ST, STE 123, OMAHA, NE 68136-1981

COVERAGES: CERTIFICATE NUMBER: 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	ADDSUBRN INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY					EACH OCCURRENCE \$ 50000
	<input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR					DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100000
B			AB000000	05/07/2015	05/07/2016	MED EXP (Any one person) \$ 50000
						PERSONAL & ADV INJURY \$ 100000
	GEN'L AGGREGATE LIMIT APPLIES PER:					GENERAL AGGREGATE \$ 50000

5. Generate and/or Email Individual Certificates

This is where the fun begins! With a few clicks, the system generates an individual certificate for each holder, saves them to the Documents tab, and more. At this point, notice the three icons at the upper right; the disc, gears and envelope.

5.1 Disk Icon: Save the Master Certificate Only

The Disk icon is used to save the Master Certificate, if you want to complete it at a later time.

1. Click the **Disc icon** to **save the Certificate Master to the Documents tab**.
2. When ready to finish the certificates, go to the **applicant's Documents tab**, locate the **Certificate Master**, go to **Actions** and click **Open Editor**.
3. Use one of the other icons listed here to complete the Certificate workflow.

5.2 Gears Icon: Two Options

The Gears icon provides two options, Generate Certificates or Generate and Download. Only use one option in order to avoid having duplicate individual certificates.

1. Click the **Gears icon**, then select **all holders** (for our example, this is a new certificate, so we'll generate a certificate for every holder.)

5.2.1 Generate Certificates Button

Click the **Generate Certificate** button to:

1. Save the Master Certificate to the Documents grid.
2. Generate individual certificates for each holder and save them to the Documents grid.

5.2.2 Generate and Download Button

Click the **Generate and Download** button to:

1. Save the Master Certificate to the Documents grid.
2. Generate individual certificates for each holder and save them to the Documents grid.
3. **PLUS, all of the individual certificates download to your computer as ONE document.** This is useful for emailing all of the certificates to one person, or to print all of the certificates. Easier to do these tasks with one document than many individual documents.

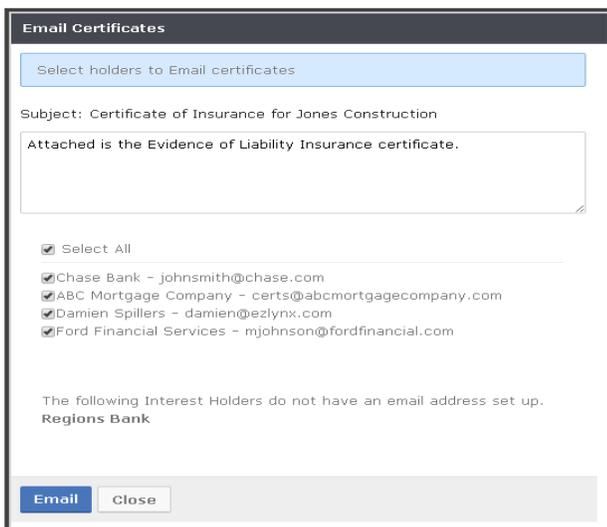
5.3 Envelope Icon: Generate & Email

Click the **Envelope icon** to:

1. Save the Master Certificate to the Documents grid.
2. Generate individual certificates for each holder and save them to the Documents grid.
3. **PLUS, email each individual certificate to the holder.** Copies of individual emails are saved on the applicant's Activity tab.

Using the Envelope icon:

1. Click the **Envelope icon**, and **select the holders**.
2. Add an **email message**.
3. **Holders without an email address** are displayed at the bottom of the box.



a. **To enter a missing email address:**

- **Close** the box.
- **Locate the holder** at the upper left.
- Click the holder's **Pencil icon**.
- **Add the email address** and Save.
- Click the **Envelope icon again** and now you can email all holders.

4. Click the **Email button**.

6. Locate the Master Certificate and Individual Certificates

There are times when you'll want to locate a Master Certificate or the individual certificates that were generated from it.

To locate a Certificate Master:

1. Go to the applicant's **Documents tab**.
2. Certificate Masters are listed in the **main documents grid** with all other documents.
3. In the **document type** column they are listed as "**Certificate Master**".
4. If there is a typo or other mistaken data on the Certificate Master, that mistake is applied to all the individual certificates generated from the Master Certificate. Errors on the master can be fixed by going to the right, click **Actions** and select **Open Editor**. Fix the mistake and [re-generate the individual certificates using one of the options](#).
5. To **rename a Master Certificate or associate it with a specific policy**, click **Actions**, and select **Properties**.

To locate the individual certificates generated from a Certificate Master:

1. Go to the applicant's **Documents tab**.
2. Locate the **Master Certificate**, and **click anywhere on the "bar"** – this expands the page to display all of the individual certificates.
3. At any **individual certificate**, go to the right and **click Actions to**:
 - a. **Open Editor** = fix an error on the individual certificate and re-save.
 - b. **Email** = send the individual certificate to one or more people (even if you used the envelope icon to email the certificate already, this comes in handy if someone says they didn't receive the original email).
 - c. **Properties** = rename the document or associate it with a specific policy.
 - d. **Delete** = delete the certificate.
4. To **return to the Main documents page**, see the **"crumb trail" links** at the upper left of the page, and click **Documents**.

Type	Document Name	Document Type	Policy #	Created By	Date Created	Date Modified	Share	Actions
	ACORD 75 (2016-03) for Seattle Public Works	Certificate of Insurance	AB-9999	Jane EZLynx	11/15/2016	11/15/2016	<input type="checkbox"/>	Actions ▾
	ACORD 75 (2016-03) for Michael Nelson	Certificate of Insurance	AB-9999	Jane EZLynx	11/15/2016	11/15/2016	<input type="checkbox"/>	Actions ▾
	ACORD 75 (2016-03) for John's Drywall	Certificate of Insurance	AB-9999	Jane EZLynx	11/15/2016	11/15/2016	<input type="checkbox"/>	Actions ▾

7. Create Individual Certificates for Additional Holders during the Policy Term

Sometimes it's necessary to provide certificates to additional holders during the policy term.

We make this process easy.

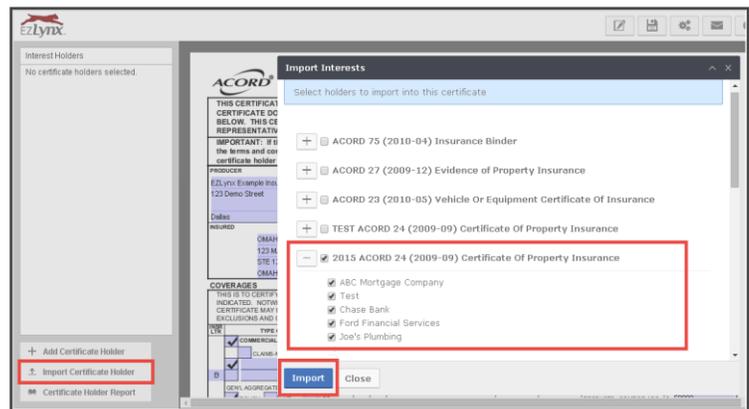
1. Go to the applicant's Documents tab.
2. Locate the **Certificate Master**, go to the right and click **Actions**, then select **Open Editor**.
3. Click the **Add Certificate Holder** button on the left side and **add additional holders as usual**.
4. Click the **Gears OR Envelope icon as usual**, but only **select the new additional holders**.

8. Renewal Time: Create New Master Certificate & Import Prior List of Holders

Follow all of the steps in this guide for creating a Master Certificate and generating individual certificates

– but with these exceptions:

1. Check that the **policy renewal download has been received in EZLynx** or the **manual policy is updated**.
2. Create a new Certificate Master, **but instead of adding the holders one-by-one import the holder list from the prior Certificate Master**.
 - a. At the left holder area, click the **Import Certificate Holder** button.
 - b. Locate the **prior Certificate Master**, and **select the holders to import**.
 - c. Click the **Import** button.



9. Email a List of Holders for a Certificate

Sometimes an agency receives a request for a list of the holders for a certificate.

1. Locate the **Certificate Master** on the **Documents tab**.
2. Go to **Actions** menu at right, and select **Open Editor**.
3. From **holder area** on the left side of the page, click **Certificate Holder Report** at bottom.
4. Click **Export to Excel** button at bottom left of page.

Questions? Contact support@ezlynx.com.