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Certificates Enhancement Features

- No more “Certs” tab. At Client Level go to “Forms” and choose “Acord 25”.
- Tab format allows you to go back and forth thru tabs to make corrections.
- When navigating tabs, use “Back” or “Next” button, or just click the tab.
- Can move to tabs without saving – saves automatically, no “save?” question.
- Until preview or final save you can go back to the beginning or any tab.

Certificates Templates

- To create a certificate, you create a “Template” first.
- Master Certificates are now called “Templates” and show as MS.
- Continue using current naming conventions for master cert template.
- No such thing as Master Print as all subcerts are created in one process but show as MS, not MP.
- Certificates are attached to the “Template.”

Important Tips

- Every time you make a change to an existing template, a new template is created.
- Every time you make a change to a cert attached to a template, a new cert is created.
- No longer able to go back and change a description with “Error” or “Void” on saved forms as before. Every save will show another cert in the grid listing. Vertafore is looking at this.
- Therefore, the most current cert is the version that was distributed.
- To amend a cert that was distributed, continue using the current supercede wording.

Accessing and Viewing Existing Certificates

1. Bring up the Client Screen. Select FORMS and ACORD 25 Certificates.

Old Grid View



Certificate Type	Certificate Holder	Desc Of Ops	Issue Date
	Mortgagee #2 ASB	** Supplemental Name **	09/08/2010
	Mortgagee #1 CPB	** Supplemental Name **	09/08/2010
	Kehena Ranch	Proof of insurance certificate provided for coverages	12/30/2009
	Test AI - I can edit this line		10/27/2009
	Bishop Estate	Bishop Estate (Lessor of Building) is named Additional	10/27/2009
MP	Master Print GL 09-10		08/17/2009
MP	Master Print GL 09-10		08/17/2009
MP	Master Print GL 09-10		08/17/2009
MS	CAUAWCO/GLI 09-10		07/07/2009

New Grid View



Cert Number	Type	Named Insured	Template Description	Desc. of Operations	Issue Date
228231		PLAY TWO CLIENT - Add APP policies only	Kehena Ranch	Proof of insurance certificate provided for	12/30/2009
224009		PLAY TWO CLIENT - Add APP policies only	Test AI		10/27/2009

2. Column named "Template Description" replaces "Certificate Holder".
3. Master cert is now called templates.
4. Current naming convention of masters still apply: YY-YY (LOB) (LOB)
5. Grid now displays Templates as MS, older MS certificate records, older MP certificate records and older individual certificates (no type code).
6. Type column will show new Templates as MS. No new MP will show. No blank types (one time cert) will show.

7. “Display” button

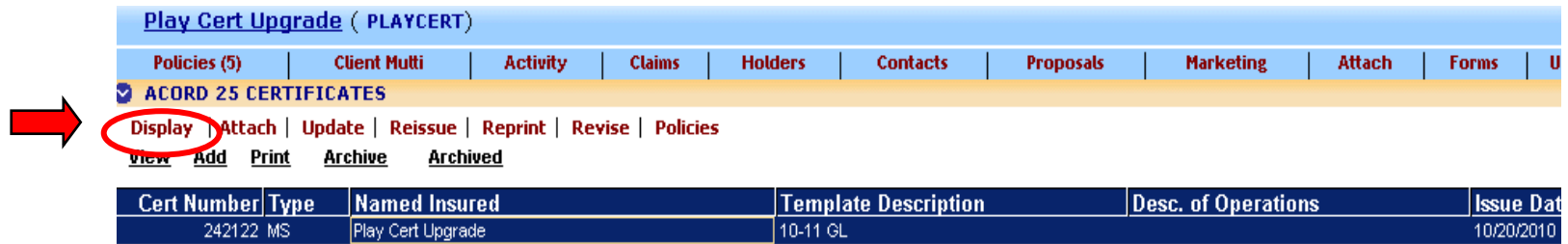
- By highlighting a MS or a MP or an older individual cert template and clicking “Display” the bottom portion of the screen will list all the certificates attached to the selected template (previously known as subcerts)
- Status column:

Blank status – Certificate was created prior to 7.6 Upgrade.

N = Not stored – just printed.

(stored refers to a separate cert server which Atlas is not using)

- To view a cert in the grid list, highlight the certificate holder name, click “View”.



Play Cert Upgrade (PLAYCERT)

Policies (5) | Client Multi | Activity | Claims | Holders | Contacts | Proposals | Marketing | Attach | Forms | U

✓ ACORD 25 CERTIFICATES

Display | Attach | Update | Reissue | Reprint | Revise | Policies

View | Add | Print | Archive | Archived

Cert Number	Type	Named Insured	Template Description	Desc. of Operations	Issue Date
242122	MS	Play Cert Upgrade	10-11 GL		10/20/2010

CERTIFICATES/AOIS ATTACHED TO SELECTED CERTIFICATE TEMPLATE

View | Print | Revise | Delete | Redistr | OneDoc

Cert Number	Named Insured	Certificate Holder	Desc. of Operations	Issue Date	Status
242164	Play Cert Upgrade	Bishop Estate	Revision #1	10/27/2010	N
242162	Play Cert Upgrade	Bishop Estate	Revision #1	10/27/2010	N
242125	Play Cert Upgrade	Bishop Estate	Bishop Estate (Landowner) is named as	10/20/2010	N
242124	Play Cert Upgrade	Bishop Estate	Bishop Estate (Landowner) is named as	10/20/2010	N

PLAYCERT - AMS2 - Windows Internet Explorer

Play Cert Upgrade (PLAYCERT)

Policies (5) | Pot Multi | Invoicing | Atlas Page1 | Aoi (10) | Locations (1) | Prior | Names | Cov | Und | Forms >>

ADDITIONAL/OTHER INTEREST SELECTION

SAVE QUIT COPY PREY NEXT REDISPLAY

ADDITIONAL / OTHER INTERESTS

POLICY INFO: **GLI9999999** INSURED: **PLAY CERT UPGRADE** ITEM ID: **1140367**

POLICY SEQ	INSURER	COVERAGE	POLICY DATES	LAST ENTRY	TRANS EFFECTIVE	LAST USER	CHG#	TIME
851639	ISL	GLI	10/01/2010-10/01/2011	10/08/2010	10/01/2010	ASM	2	15:37:10

INTEREST EXPAND ALL DATE OFF

ADDITIONAL INTEREST#

AOI CODE

HOLDER/LOAN#

INTEREST NAME Bishop Estate

MAIL ADDRESS 4242 Kamehameha School Campus Road

ZIP CODE

CITY, ST Honolulu HI

PHONE 1

PHONE 2

FAX

EMAIL ADDRESSES

PREFERRED DISTRIBUTION

CANCELLATION AMENDMENT? No

NO. CANCELLATION DAYS

NO. DAYS FOR NON-PAYMENT

ACORD LINE OF BUSINESS THIS APPLIES TO FOR PACKAGE POLICIES:

INTEREST NATURE LL AI - Land Lease Interests (CG 20 24)

INTEREST PAY?

POLICY REQUIRED/ISSUED

CERTIFICATE REQUIRED/ISSUED

CERTIFICATE DATE

INFORM OF BILL?

INTEREST RANK

POLICY FREQUENCY CODE

POLICY DATE

CERTIFICATE FREQUENCY CODE

BILL FREQUENCY CODE

INTEREST END DATE

> ASSOCIATED LOCATIONS (1) ^ Top
 > ASSOCIATED VEHICLES (0) ^ Top
 > ASSOCIATED SCHEDULE ITEMS (0) ^ Top
 > ASSOCIATED SUPPLEMENTAL NAMES (0) ^ Top
 > DESCRIPTION OF OPERATIONS ^ Top
 > GROUP CODES (2) ^ Top
 > CONDO OWNERS INFORMATION (0) ^ Top

> ATTACHMENTS

Ready For Input

Local intranet 100%

◆ **AOI Grid at the policy level (Units-Additional Interest) - New Fields Added to Grid:**

- Preferred Distribution – (optional) information only
- Cancel Days; Cancel Amendment and Non-Pay Days – Do Not Enter data
- "Associated Supplemental Names" - Do not enter data. creating “New” master for each Supplemental Named Insured
- Description of Operations – no change to inputting data
Description of Operations field has been extended from 75 characters to 108 characters. Existing Description of Operations from an AOI/Holder screen will continue to prefill as currently entered until it is changed.
- Group Codes: continue to use Group Codes – no change to inputting data. All group codes will now print to Adobe schedule (before, only one group code would print)

◆ **New Section - Attachments** – continue using Attachments from Image Right

◆ **• Holders Grid at the client level - new fields added to grid:**

- Same fields as AOI above

General Overview - Creating Certificates

- Master Certificates are now called "Templates"
- No such thing as Master Print as all Masters Subcerts can be created in one process (but still show as MS)
- Every time you make a change to an existing cert, a new template is created - so you'll always be able to see each version of the certificate.
- Tab format allows you to go back and forth thru tabs to make corrections, deselect or select a different policy etc.
- All changes on tabs are automatically saved; you won't get a separate "save" question
- When navigating tabs, you can use "Back-Next" buttons, or just click the tab.

ACORD 25 CERTIFICATES

ACORD CERTIFICATE POLICY SELECTIONS										
QUIT										
Policies	GROUP CODES	ADDITIONAL INTERESTS/HOLDERS	SUPPLEMENTAL NAMES	PREVIEW						
POLICIES (5)										
Policy#	Policy	Insurer	Coverag	Eff Date	Exp Date	Bill	CNR	Cancel date	Premium	Policy Desc
851639	GLI9999999	ISL	GLI	10/01/2010	10/01/2011	C				
851640	BA8888888	ISL	CAU	10/01/2010	10/01/2011	C				
851641	WC7777777	ISL	WCO	10/01/2010	10/01/2011	C				
851642	IUB6666666	ISL	XLS	10/01/2010	10/01/2011	C				
851643	FIRE5555555	ISL	CPR	10/01/2010	10/01/2011	C				

POLICY SELECTIONS

EXPAND ALL

General Liability

AUTO

WORKERS COMPENSATION

EXCESS LIABILITY

GARAGE

OTHER

Leave unchecked

INCLUDE ON THE CERTIFICATE DESCRIPTION OF

SUPPLEMENTAL NAMES

ADDITIONAL COVERAGES

*UNITS/COVERAGE FOR AOI

INCLUDE ON THE AOI/HOLDERS TAB

ADDITIONAL INTERESTS

ONLY ACTIVE ADDITIONAL INTERESTS/HOLDERS

OTHER

Use AOI/Holder SUPP NAME LINKS

FORM VERSION 09/09

TEMPLATE DESCRIPTION

- Bring up the Client Screen. Select FORMS and ACORD 25 Certificates.
- Click "Add" in the ACORD 25 Certificate Grid to launch the Certificate Wizard.
- Select the policies for the certificate by highlighting the policy and then clicking the *Line Of Business* (LOB) that the policy corresponds to from the top bar.
- The policy will then appear in the Policy Selections section of the page.
- Select the policy for miscellaneous policies such as Property, Equipment and use the "Other" field from the LOB selection.

- **"Include" and "Other" sections have been prefilled for you. – Do Not Amend.** Information should be entered through AOI prompting in description of operations
- Include on the AOI/holders Tab - to choose a holder or AOI, check one or both fields —leave "Active" field unchecked
- Enter in a Template Description (Naming convention) ex: Year (2009-2010) - Line of Business (GL, Auto, Umb), this is a mandatory field. Click Next to continue or click the tab at the top for the next section that applies.
- Bypass Group Code tab
- Bypass Additional Interests/holders tab
- If you have Supplemental name(s) entered for the client, you can select the Supp. Names tab and select the names that you wish to include on the certificate from the grid, and click next or the Preview tab.
- The Preview screen will show you a Template preview of your certificate.

PLAYCERT - AMS2 - Windows Internet Explorer

ACCORD 09/09

Play Cert Upgrade (PLAYCERT)

ACCORD 25 CERTIFICATES

SAVE PRINT ALL QUIT DELETE

ACORD 25 CERTIFICATE 2009/09

POLICIES GROUP CODES ADDITIONAL INTERESTS/HOLDERS SUPPLEMENTAL NAMES Preview

Template Preview

CERTIFICATE ID: 242123 ISSUE DATE: 10/20/2010

OPTIONS | ATTACHMENTS | DESCRIPTIONS | GENERAL LIABILITY | AUTO LIABILITY | EXCESS/UMBRELLA LIABILITY | WORKERS COMP | OTHER LIABILITY

PRODUCER

Atlas Insurance Agency, Inc.
1132 Bishop St., Suite 1600
Honolulu, HI 96813
808 533-3222

PRODUCER CONTACT INFO

CONTACT NAME
PHONE # 808 533-3222
FAX # 808-533-8777
E-MAIL ADDRESS
CUSTOMER ID #

INSURED

Play Cert Upgrade
1132 Bishop Street, Suite 1600
Honolulu, HI 96814

INSURERS AFFORDING COVERAGE

INSURER	NAIC #
INSURER A Island Insurance Company, Ltd	
INSURER B	
INSURER C	
INSURER D	
INSURER E	
INSURER F	

CERTIFICATE HOLDER

10-11 GL
----- Template -----
----- Template -----
----- Template -----
----- Template -----
----- Template -----

CERTIFICATE REFERENCE INFO

CERTIFICATE NUMBER
REVISION NUMBER

CLIENT ACCESS DESCRIPTION (ACTIVATES CERTIFICATE FOR CLIENT ACCESS!)

OPTIONS

No. of DAYS FOR NON-PAYMENT
SIGNATURE
CERTIFICATE Desc. Code

ATTACHMENTS

Ready For Input

Start | HOM1 - Sagitta Home Pa... | PLAYCERT - AMS2 - W... | Sagitta Screen Shots for ... | My Computer | Local intranet | 100% | 10:47 AM

Shows name of Template

PLAYCERT - AMS2 - Windows Internet Explorer

ACCORD 09/01

Play Cert Upgrade (PLAYCERT)

Policies (5) | Client Multi | Activity | Claims | Holders | Contacts | Proposals | Attach | Forms | Units >>

ACORD 25 CERTIFICATES

SAVE PRINT ALL QUIT DELETE

ACORD 25 CERTIFICATE **2009/01**

POLICIES | GROUP CODES | ADDITIONAL INTERESTS/HOLDERS | SUPPLEMENTAL NAMES | Preview

Template Preview

CERTIFICATE ID: 242128 ISSUE DATE: 10/25/2010

OPTIONS | ATTACHMENTS | DESCRIPTIONS | GENERAL LIABILITY | AUTO LIABILITY | GARAGE LIABILITY | EXCESS/UMBRELLA LIABILITY | WORKERS COMP | OTHER LIABILITY

PRODUCER	INSURERS AFFORDING COVERAGE	NAIC #
Atlas Insurance Agency, Inc.	INSURER A Island Insurance Company, Ltd	
1132 Bishop St., Suite 1600	INSURER B	
Honolulu, HI 96813	INSURER C	
808 533-3222	INSURER D	
	INSURER E	

INSURED	CERTIFICATE HOLDER
Play Cert Upgrade	01/09 Version
1132 Bishop Street, Suite 1600	----- Template -----
Honolulu, HI 96814	----- Template -----
	----- Template -----
	----- Template -----
	----- Template -----

CLIENT ACCESS DESCRIPTION (ACTIVATES CERTIFICATE FOR CLIENT ACCESS!)

OPTIONS

No. of Days CANCELLATION NOTICE

No. of Days FOR NON-PAYMENT **Do not use**

SIGNATURE

CANCELLATION AMENDMENT? **Drop Down: Yes or No; Choose "Yes" for x-out**

CERTIFICATE DESC. CODE

ATTACHMENTS

DESCRIPTIONS

DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES/EXCLUSIONS/SPECIAL PROVISIONS

Ready For Input

Local intranet 100%

Start | HOM1 - Sagitta Home Pa... | PLAYCERT - AMS2 - W... | Sagitta Screen Shots for ... | 3:38 PM

- The Certificate Holder Section will show the name of the template
- Certificate reference information (cert no. and revision no.) – Do Not enter any information. Atlas will continue to use “Supersede” wording
- Number of Days Cancellation Notice - [If using cert version 09/01 - Enter a number of Cancellation Days \(Refer to Atlas certificate guideline for usage\)](#) **Do Not enter number of days when issuing certificate version 09/09.** If need to “x-out” see immediate items (a) and (b) below
- (a) Number of Days for Nonpayment – Do Not Enter, continue to enter data under coverage section – policy number
- (b) Cancellation Amendment – select “yes” to x-out (Refer to Atlas certificate guideline for usage)
- Signature Field - Click the search next to the signature field and select a signature or if you know the initials, enter them.
- Certificate “DESC” (Description) – Do Not Enter any information
- Attachment Field – do not use. Continue using Attachments from Image Right
- Under Description of Operations: Enter information desired for this certificate. Example Surplus Lines Wording. Again, any info on the holder or AOI screen "wins" over this information entered.
- “Addl Insrđ” and “Subr Wvd” Columns – leave blank on template. To be completed when issuing individual certificates.
- Every template with Workers Compensation – remove “Y” or “N” for question “Any Proprietor/Partner/Executive Officer /Member Excluded?” and remove all prompts that pull to the Description of Ops. **(Atlas Agency Guidelines)**

PLAYCERT - AMS2 - Windows Internet Explorer

Play Cert Upgrade (PLAYCERT)

Policies (5) | Client Multi | Activity | Claims | Holders | Contacts | Proposals | Attach | Forms | Units >>

ACORD 25 CERTIFICATES

DESCRIPTIONS

DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES/EXCLUSIONS/SPECIAL PROVISIONS

GENERAL LIABILITY

INSR LTR	ADD'L INSRD	SUBR WVD	TYPE OF INSURANCE	POLICY NUMBER	EFF DATE	EXP DATE	LIMITS
A	<input type="checkbox"/>	<input type="checkbox"/>	GENERAL LIABILITY	GLI9999999	10/01/2010	10/01/2011	EACH OCC
	<input type="checkbox"/>	<input type="checkbox"/>	COMM'L G/L				DAMAGE TO RENTED PREMISES
	<input type="checkbox"/>	<input type="checkbox"/>	CLMS <input type="checkbox"/> Occ				MED EXP \$
	<input type="checkbox"/>	<input type="checkbox"/>					PERS/ADV.\$
	<input type="checkbox"/>	<input type="checkbox"/>					GEN. AGG.\$
	<input type="checkbox"/>	<input type="checkbox"/>	GEN AGG LMT PER:				PROD/CO \$
	<input type="checkbox"/>	<input type="checkbox"/>	POL				
	<input type="checkbox"/>	<input type="checkbox"/>	PRO <input type="checkbox"/> LOC				

AUTO LIABILITY

INSR LTR	ADD'L INSRD	SUBR WVD	TYPE OF INSURANCE	POLICY NUMBER	EFF DATE	EXP DATE	LIMITS
	<input type="checkbox"/>	<input type="checkbox"/>	AUTO LIABILITY				CSL \$
	<input type="checkbox"/>	<input type="checkbox"/>	ANY AUTO				EACH ACCIDENT
	<input type="checkbox"/>	<input type="checkbox"/>	ALL OWNED				BI \$
	<input type="checkbox"/>	<input type="checkbox"/>	SCHED. AUTOS				PER PERSON
	<input type="checkbox"/>	<input type="checkbox"/>	HIRED AUTOS				BI
	<input type="checkbox"/>	<input type="checkbox"/>	NON-OWNED				PER ACCIDENT
	<input type="checkbox"/>	<input type="checkbox"/>					PD \$
	<input type="checkbox"/>	<input type="checkbox"/>					PER ACCIDENT
	<input type="checkbox"/>	<input type="checkbox"/>					
	<input type="checkbox"/>	<input type="checkbox"/>					

EXCESS/UMBRELLA LIABILITY

INSR LTR	ADD'L INSRD	SUBR WVD	TYPE OF INSURANCE	POLICY NUMBER	EFF DATE	EXP DATE	LIMITS
	<input type="checkbox"/>	<input type="checkbox"/>	UMBR <input type="checkbox"/> Occ				EACH OCC\$
	<input type="checkbox"/>	<input type="checkbox"/>	EXCESS <input type="checkbox"/> CLAIMS				AGGREGATE\$
	<input type="checkbox"/>	<input type="checkbox"/>	DEDUCTIBLE				
	<input type="checkbox"/>	<input type="checkbox"/>	RET				

Ready For Input

Start | HOM1 - Sagitta Home Pa... | PLAYCERT - AMS2 - W... | Microsoft Outlook Web A... | Sagitta Screen Shots for ... | Local intranet | 100% | 10:24 AM

- In the Other Liability Section of coverages, edit the information as necessary
- Click Save.



SAGITTA CERTIFICATES

Creating Certificate Attach AOI/Holder to Template

ACCORD 25 Certificate Grid

PLAYCERT - AMS2 - Windows Internet Explorer

Play Cert Upgrade (PLAYCERT)

Policies (5) | Client Multi | Activity | Claims | Holders | Contacts | Proposals | Attach | Forms | Units >>

ACCORD 25 CERTIFICATES

Display | **Attach** | Update | Reissue | Reprint | Revise | Policies

View | Add | Print | Archive | Archived

Cert Number	Type	Named Insured	Template Description	Desc. of Operations	Issue Date
242122	MS	Play Cert Upgrade	10-11 GL		10/20/2010

BASIC CLIENT

INSURED: PLAY CERT UPGRADE ITEM ID: 134001

LAST ENTRY: 10/08/2010 LAST USER: ASM CHG#: 1 TIME: 15:20:22

CLIENT CODE: PLAYCERT DIVISION: 1 Atlas Insurance Agency, Inc.

BILL TO: PLAYCERT REF.CODE

NAME & ADDRESS **CLIENT INFO**

Play Cert Upgrade PHONE #1 PHONE #2

1132 Bishop Street, Suite 1600 FAX NUMBER CONTACT METHOD

Honolulu, HI 96814 Email WEBSITE

CBD Document Query Generate CBD Profile

PRODUCER: RTU Ray Uyeda SERVICER: ACM Alvina C. Miyasato CATEGORIES: CIND Commercial Independent, COM *Commercial

STATUSES SIC CODES

COMMENTARY: for testing sagitta upgrade cert/EPI redesign

CREDIT TERMS: 0 *0% / 0 Days NET %

SOURCE SOURCE DATE: 10/08/2010 FEIN

LEGAL ENTITY DATE BUSINESS STARTED YEARS IN BUSINESS

ADD'L BILL TO: N ADD'L BILL PRD: N

ADDITIONAL INFORMATION (AGENCY DEFINED)

DEPT OF LABOR NO. []

INSPECTION CONTACT ACCOUNTING RECORDS CONTACT NATURE OF BUSINESS CLIENT RELATIONSHIPS PARENT (0) RELATIONSHIP (0)

BASIC CLIENT SUMMARY Calc

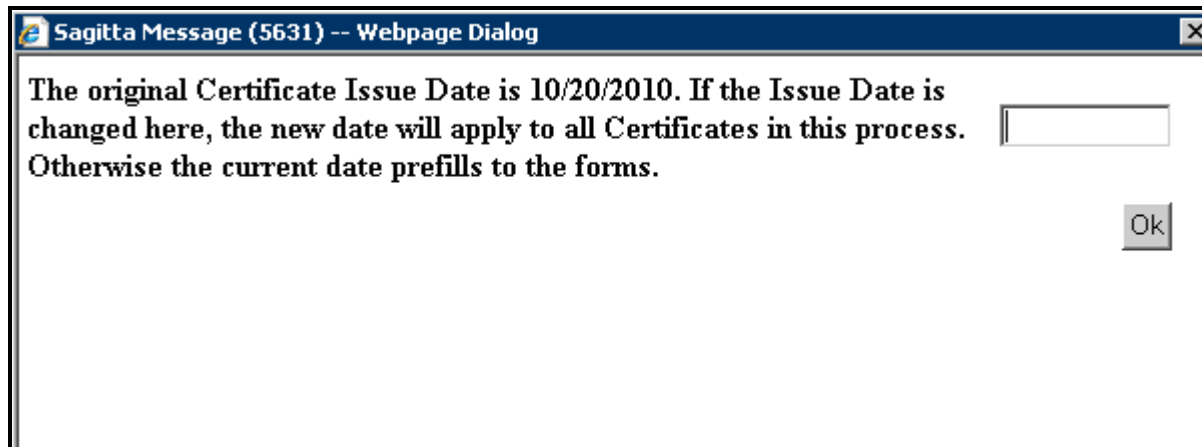
ACTIVE POLICIES	5	INVOICED PREMIUM	0
TOTAL # LOCATIONS	1	ANNUALIZED PREMIUM	0
TOTAL # VEHICLES	1	AVERAGE COMMISSION %	0
OPEN ACTIVITIES	0	COMMISSION AMOUNT	0
		ANNUALIZED COMMISSION AMOUNT	0
TOTAL # OPEN LOSSES	0	PAID AMOUNT FOR OPEN LOSSES	0.00
		SUBJECT BALANCE	0

Ready For Input

Start | HOM1 - Sagitta Home Pa... | PLAYCERT - AMS2 - W... | Sagitta Screen Shots for ... | My Computer | Local intranet | 100% | 10:56 AM

ACORD 25 Certificate Grid

- Bring up the Client Screen. Select FORMS and ACORD 25 Certificates.
- Select Template
- Click "Attach" in the ACORD 25 Certificate Grid to launch the Certificate Wizard.
- Choose Group Code where applicable
- Choose Additional Interests/Holder where applicable. When selecting more than one, click on each AOI/Holder. To deselect click again on AOI/Holder. Shift button no longer needed when making selections
- Bypass Supplemental name(s)
- Message will appear – regarding issue date – click okay and current date will prefill to form



- The Preview screen will appear, edit where applicable.
- Click Save
- If have multiple AOI/Holder's next one will appear for review and editing
- Click Save
- Repeat till done
- Printing set "page scaling" to "none" at print properties to fold perfectly into a window envelope to send to the certificate holder.
- PRINT

Revising Template

Note: Changes to Policy information (ie. Policy number, effective/expiration date, limits, and Insured's information (ie. Address) Must be revised at the Template Level by creating a NEW TEMPLATE. Follow current procedure. DO Not use editing buttons (update, reissue and revised)

Revising Certificates attached to a Template

Note: changes to AOI or Description field should be prompted first in Sagitta.

- Bring up the Client Screen. Select FORMS and ACORD 25 Certificate.
- Certificate Grid will appear, select certificate (template)
- Click Attach
- Select applicable AOI
- Message Box appears pertaining to issue date. Always Click Okay
- Enter "Supersede" wording on Certificate preview screen (insurer section) only when certificate went out the door.
- "Addl Insrd" and "Subr Wvd" Columns – check where applicable
- Click Save

Creating Evidence of Property Certificate

(Acord 27 ed. 2009/12. Use form edition 2006/07 until new is available)

Need to be at client level to create certificate. The following steps outline below will create “Template” in Property Certificate grid.

- Bring up the Client Screen.
- Select FORMS and select ACORD 27
- Click "Add" in the ACORD 27 option.
- Select appropriate Property policy.
- Enter Template description (i.e. Limits or location)

Policies (59)	Pol Multi	Invoicing	Atlas Page1 (1)	Prior	Locations (3)	Aoi (5)	Names (5)	Cov	Und	Forms >>
ACORD 27 EVIDENCE OF PROPERTY										
EVIDENCE OF PROPERTY INSURANCE POLICY										
<input type="button" value="Policies"/> <input type="button" value="GROUP CODES"/> <input type="button" value="ADDITIONAL INTERESTS"/> <input type="button" value="SUPPLEMENTAL NAMES"/> <input type="button" value="PREVIEW"/>										
POLICIES (1)										
Policy#	Policy	Insurer	Coverage	Eff Date	Exp Date	Bill Type	CNR	Cancel date	Premium	
845439	MAC7491975	GAC	CPR	07/01/2010	07/01/2011	A				
INCLUDE ON THE EPI REMARKS/SPECIAL CONDITIONS										
<input type="checkbox"/> USER-DEFINED DATA FROM POLICIES <input type="checkbox"/> USER-DEFINED ADD'L INFO <input checked="" type="checkbox"/> ADDITIONAL COVERAGES <input checked="" type="checkbox"/> SUPPLEMENTAL NAMES <input checked="" type="checkbox"/> *DESC OF Ops FOR AOI <input checked="" type="checkbox"/> *LOCATION SPECIFIC COVERAGES										
INCLUDE ON THE AOI TAB										
<input type="checkbox"/> ONLY ACTIVE ADDITIONAL INTERESTS										
OTHER										
<input type="checkbox"/> INCLUDE CONDO OWNERS <input checked="" type="checkbox"/> USE AOI SUPP NAME LINKS <input type="checkbox"/> EMAIL EPI TO USER? <input type="text" value="07/06"/> FORM VERSION										
TEMPLATE DESCRIPTION										
<input type="text"/>										
* IF THIS BOX IS UNCHECKED, SUB FORM DATA IS LIMITED TO ONLY WHAT APPEARS ON THE TEMPLATE PREVIEW.										
<input type="button" value="Cancel"/> <input type="button" value="Next"/> <input type="button" value="Preview"/>										

- Click Next
- Bypass Group Code tab
- Bypass AOI (Loss Payee)
- If you have Supplemental name(s) entered for the client, you can select the Supp. Names tab and select the names that you wish to include on the certificate from the grid, and click next or the Preview tab.
- The Preview screen will show you a Template preview of your certificate.
- Add Agent name/Account Executive in last line under Producer's Address
- Bypass Loan Number
- Enter Number of Days – Notice of Cancellation
- Signature Field - Click the search next to the signature field and select a signature or if you know the initials, enter them.
- Bypass - Location/Description Box
- Coverage Lines – information will prefill as prompted. Review and clean-up as needed. See minimum guidelines below.

Guideline: "Atlas" Minimum information required

- *Cause of Loss Form*
 - *Type of Property and/or Coverage and Limits (Building, BPP, Business Income)*
 - *Deductible: AOP & Hurricane*
-
- Remarks – Supplemental Names (if any) will prefill – edit where applicable
 - Description Code Box – Leave Blank
 - Click Save

Creating Evidence of Property Acord 27 - Attach AOI/Holder to Template

- Bring up the Client Property Policy
- Select FORMS and ACORD 27
- Select Template Click "Attach"
- Choose Group Code where applicable
- Choose Additional Interests/holders where applicable. When selecting more than one, click on each AOI/Holder. To deselect click again on AOI/Holder. Shift button no longer needed when making selections
- Bypass Supplemental name(s)
- Message will appear – regarding issue date – click okay and current date will prefill to form
- The Preview screen will appear, edit where applicable. Add loan number, Mortgagee, etc. if information has not pulled from prompting.
- Click Save
- If have multiple AOI/holders next one will appear for review and editing
- Click Save
- Repeat till done
- Printing set "page scaling" to "none" at print properties to fold perfectly into a window envelope to send to the certificate holder.
- PRINT

Creating Evidence of Property Certificate (Acord 28 ed. 2009/12. Use form edition 2006/07 until new is available)

Need to be at client level to create certificate. The following steps outline below will create “Template” in Property Certificate grid.

- Bring up the Client Screen.
- Select FORMS and ACORD 28
- Click "Add" in the ACORD 28 option.
- Select appropriate Property policy.
- Enter Template description (i.e. Limits or location)
- Signature selection list will appear, select box for Authorized signature.

SAGITTA CERTIFICATES

Creating Evidence of Property Certificate

ACORD EVIDENCE OF COMMERCIAL PROPERTY INSURANCE DATE (MM/DD/YYYY) _____

THIS EVIDENCE OF COMMERCIAL PROPERTY INSURANCE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE ADDITIONAL INTEREST NAMED BELOW. THIS EVIDENCE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS EVIDENCE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE ADDITIONAL INTEREST.

PRODUCER NAME: Atlas Insurance Agency, Inc. PHONE (AG, RA, SA): (808) 533-3222 COMPANY NAME AND ADDRESS: National Surety Corporation
 CONTACT PERSON AND ADDRESS: 1132 Bishop St, Ste 1600, Honolulu, HI 96813
 Agent: R. Sakata / ost

TAX ID: 808 775-0076 FAX: (808) 533-3222
 E-MAIL: rsakata@ataha.net

DATE: 28(2009/12)

INSURED: Ann Pearl Care Home, Inc. POLICY TYPE: Commercial Property
 ADDRESS: 45-181 Waialua Road, Kaneohe, HI 96744
 POLICY NUMBER: MZF80451436

EFFECTIVE DATE: 10/01/2009 EXPIRATION DATE: 10/01/2010

PROPERTY INFORMATION (Use REMARKS on page 2, if more space is required) BUILDING OR BUSINESS PERSONAL PROPERTY
 LOCATION/DESCRIPTION: 45-181 Waialua Rd., TMK 1-4-5-11-8; Kaneohe, HI 96744

COVERAGE INFORMATION PERLS INSURED: BASIC BROAD SPECIAL
 COMMERCIAL PROPERTY COVERAGE AMOUNT OF INSURANCE: \$10,037,500 DED: 10,000

	YES	NO	NA	IF YES, LIMIT:	DED:
<input checked="" type="checkbox"/> BUSINESS INCOME	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$3,077,350	
<input type="checkbox"/> RENTAL VALUE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
BLANKET COVERAGE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
TERRORISM COVERAGE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
LIMITED FUNGUS COVERAGE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
FUNGUS EXCLUSION (if "YES", specify organization's form used)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
REPLACEMENT COST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
AGREED VALUE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
CONSURANCE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	90 %	
EQUIPMENT BREAKDOWN (if Applicable)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$10,037,500	
ORDNANCE OR LAW	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
EARTH MOVEMENT (if Applicable)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
FLOOD (if Applicable)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
WIND / HAIL (if Subject to Different Provisions)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
PERMISSION TO WAIVE SUBROGATION IN FAVOR OF MORTGAGE HOLDER PRIOR TO LOSS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

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ACORD EVIDENCE OF COMMERCIAL PROPERTY INSURANCE DATE (MM/DD/YYYY) 02/09/2010

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PRODUCER NAME: Atlas Insurance Agency, Inc. PHONE (AG, RA, SA): (808) 533-3222 COMPANY NAME AND ADDRESS: National Surety Corporation
 CONTACT PERSON AND ADDRESS: 1132 Bishop St, Ste 1600, Honolulu, HI 96813
 Agent: R. Sakata / ost

TAX ID: 808 775-0076 FAX: (808) 533-3222
 E-MAIL: rsakata@ataha.net

DATE: 28(2006/07)

INSURED: Ann Pearl Care Home, Inc. POLICY TYPE: Commercial Property
 ADDRESS: 45-181 Waialua Road, Kaneohe, HI 96744
 POLICY NUMBER: MZF80451436

EFFECTIVE DATE: 10/01/2009 EXPIRATION DATE: 10/01/2010

PROPERTY INFORMATION (Use REMARKS on page 2, if more space is required) BUILDING OR BUSINESS PERSONAL PROPERTY
 LOCATION/DESCRIPTION: 45-181 Waialua Rd., TMK 1-4-5-11-8; Kaneohe, HI 96744

COVERAGE INFORMATION PERLS INSURED: BASIC BROAD SPECIAL
 COMMERCIAL PROPERTY COVERAGE AMOUNT OF INSURANCE: \$10,037,500 DED: 10,000

	YES	NO	NA	IF YES, LIMIT:	DED:
<input checked="" type="checkbox"/> BUSINESS INCOME	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$3,077,350	
<input type="checkbox"/> RENTAL VALUE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
BLANKET COVERAGE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
TERRORISM COVERAGE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
LIMITED FUNGUS COVERAGE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
FUNGUS EXCLUSION (if "YES", specify organization's form used)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
REPLACEMENT COST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
AGREED VALUE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
CONSURANCE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	90 %	
EQUIPMENT BREAKDOWN (if Applicable)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$10,037,500	
ORDNANCE OR LAW	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
EARTH MOVEMENT (if Applicable)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
FLOOD (if Applicable)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
WIND / HAIL (if Subject to Different Provisions)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
PERMISSION TO WAIVE SUBROGATION IN FAVOR OF MORTGAGE HOLDER PRIOR TO LOSS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

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When providing instructions on certificate, please include a complete "sample cert" for AAs to follow.