How to Issue/Print/View Certificates

After logging in with your user name and password the **<u>Choose A Client"</u>** page will display

1) Select the client name you want and click on the icon next to it

Next Screen **<u>"MY POLICIES"</u>**

2) On the left side menu SELECT **Certificates**
3) Choose the most current certificate and click on the icon next to it

A list of Certificate Holders will display in the screen below the Certificates with the
Certificate TITLE displayed:

4) To **CHOOSE** a Holder already displayed click on the icon next to it
and a screen will prompt you to fax, email, or view/print the certificate.
Please select your option and follow instructions accordingly.

5) To send a certificate to someone not listed **SELECT   ADD HOLDER**
Our system contains several thousand certificate holders so your certificate holder
is likely to be in our system. You may choose to search our system to find it by
simply selecting your search criteria button (zip, name, address) and then typing
the search data you wish to search for in the **Search For**: field.

Otherwise, click on the **ADD NEW HOLDER** button

6) On the **ADD NEW HOLDER** screen please enter name as requested by your
Certificate holder and complete address; noting the **ATTN:** line is an excellent
Place to insert their fax number or email address.
Click on **ADD THIS HOLDER** to conclude the addition

7) You are then brought back to the list of holders page and you can now
SELECT the holder you just created. **GOTO #4** above to
fax, email, view/print your certificate

When finished click on **LOG OUT** to exit.