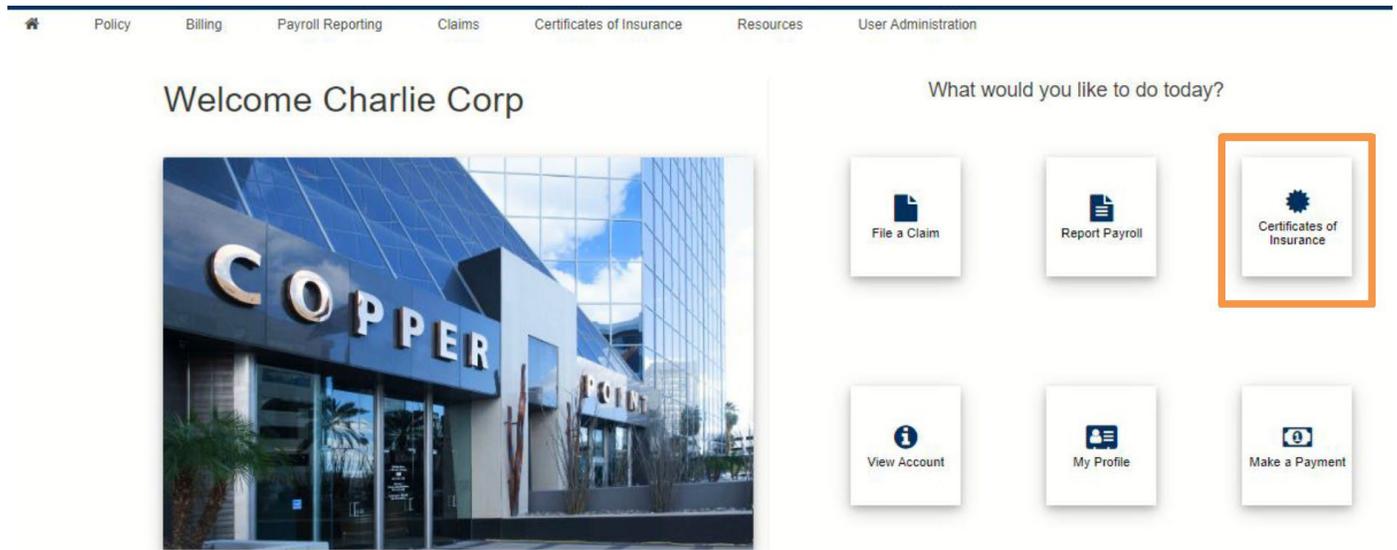


Certificates of Insurance

Last Updated February 1, 2022

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 the following tabs: Home, Policy, Billing, Payroll Reporting, Claims, Certificates of Insurance (highlighted), Resources, and User Administration. Below the navigation bar, the main content area is divided into two sections. On the left, a large image of a modern building with 'COPPER' signage is displayed under the heading 'Welcome Charlie Corp'. On the right, a section titled 'What would you like to do today?' contains six interactive 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:

(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

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	No
-----	-----------

Job Number

Location

Description of Operations

Arizona

0016 - FARM: ORCHARDS - ALL EMPLOYEES

Colorado

0005 - FARM - TREE PLANTING - REFORESTATION

Cancel

Save

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:

Certificates of Insurance

Policy #: Policy Period: Create

Q

SELECT	HOLDER NAME	CERT #	NAMED INSURED	LOCATION	JOB #	WAIVER OF SUBROGATION
<input type="checkbox"/>	Turk Turkleton	1	Account Demo Inc	Phoenix	5	
<input type="checkbox"/>	John Dorrian	2	Account Demo Inc	Thousand Oaks	3	
<input type="checkbox"/>	Elliot Reid	3	Demo Restaurant	Mesa	6	
<input type="checkbox"/>	Carla Espinoza	4	Account Demo Inc dba Demo Restaurant	Los Angeles	2	

Remove Download All Download Selected

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.