

CERTIFICATE OF LIABILITY AND CERTIFICATE HOLDERS

The Certificate of Liability Insurance (ACORD[®] 025) is used when a customer has requested documentation of liability coverages be sent to a third party.

HawkSoft recommends that you create a "master" Certificate of Liability template, and then always edit the master as needed moving forward.

The HawkSoft CMS interface with the ACORD 025 gives you the ability to:

- Create a "master" certificate, and then edit the master as needed.
- Attach additional documents that may need to accompany the certificate
- Electronically sign and distribute the certificate(s) via email

This article describes how to use the CMS Certificate of Liability Wizard to create a "master" certificate and modify the master and certificate holders moving forward.

Required Permissions

To access the Certificate of Liability Wizard

1. Retrieve a client file and then select the **Client** tab or a policy within that file.
2. Click [Action](#), and then select one item in each of the first three lists to describe what prompted this transaction.
3. Select **Print/Create** > **Certificate of Liability (025)**.
The **Edit - Certificate of Liability Insurance** dialog opens.
4. Use the options available in this dialog to create a new "master" certificate or make changes to an existing certificate.

To create or modify a "master" Certificate

The following steps describe the process of creating or modifying a master Certificate of Liability with many fields populated from data in the client file. To generate a blank certificate, see [Creating and Modifying an ACORD Form](#).

1. [Access](#) the **Edit - Certificate of Liability Insurance** wizard.
2. Click **New** to create a new "master" certificate.

OR

Highlight the certificate, and then click **Edit** to add a certificate holder or make changes to an existing certificate.

3. Use the available side-tabs to complete or update the Certificate of Liability information.

Terms

The current ACORD 25 form is selected by default.



NOTE: A separate ACORD Form (Form 030 Certificate of Garage Insurance (2010/12) is available, if needed. See [Generating a Certificate of Garage Insurance](#).

The older ACORD 25 (2001/08) is still available from the drop-down, although this form is no longer valid.

Review the terms of the selected certificate.

Producer & Insured

Information in the Producer and Insured fields defaults from the [Name and Address](#) screen in the client file and from data entered on the [Agency Information](#) screen.

Liability

Complete the available liability side-tabs, as needed, to complete the Certificate of Liability for the selected client.

A Liability side-tab is available for the following lines of business:

- General
- Automobile
- Excess
- Workers Comp

- Other 1 and 2



NOTE: If you selected ACORD 25 (2001/08), you will also have a *Garage* side-tab and an additional *Other 3* side-tab.

Each of the Liability side-tabs contains a **Lookup** button to enable you to select a line of business (LOB) entered on a policy for the selected client.



NOTE: The *Other 1* and *Other 2* side-tabs are available for miscellaneous LOBs.

Fields for **Insurer**, **Type of Insurance**, and **Limits** are available on each screen. The field information propagates from the policy for the selected LOB and completes the sections on the Certificate of Liability Insurance form for the selected LOB.

- a. Select each **Liability** side-tab as needed, and then click the **Lookup** button to select the line of business (LOB) for the policy.
- b. Modify the liability information as needed.

Description of Operations Template

Enter or modify the default description for the

Operations/Locations/Vehicles/Exclusions Added by Endorsement/Special Provisions.

The information entered on this screen serves as a template for the Certificate Holder Description of Operations and will be the default for all new Certificate Holders. You can enter a different description for specific certificate holders, as needed, when adding or modifying a

certificate holder. See [Certificate Holder](#) below.

Certificate Holder

This screen enables you to add or modify a description for the certificate and add or modify a certificate holder.

You can select which liability sections (general, auto, workers comp, etc.) to include on the certificate based on the selected certificate holder.

- a. Select the **Certificate Holder** side-tab.
- b. Enter or modify the **Certificate Description** to identify this certificate.
- c. Select a certificate holder from the list, and then click **Edit**.

OR

Click **Add** to enter a new certificate holder.

The **Add/Edit Certificate Holder** dialog opens with the Contact Information side-tab selected.

Contact Information

This screen enables you to select and enter the certificate holder and contact information.

If the certificate holder is already in the [Additional/Other Interests/Certificate Holder Database](#), click **Lookup**, and then select the certificate holder.

OR

Click **From AI List**, and then select an additional interest

that has already been added to the policy.

Description/Other Info

Select the **Description/Other Info** side-tab to complete the certificate holder information.

- i. Enter the **Description of Operations/Locations/Vehicles/Exclusions Added by Endorsement/Special Provisions** for this certificate holder.

**NOTE:**

When you have entered a description on the **Description of Operations Template** side-tab, this option is selected by default, and the description is displayed in the **Description** field.

Optional:
Uncheck **Use Description of Operations Template** to modify the description for specific certificate holders.

- ii. Add comments in the **Additional Remarks** section as needed.

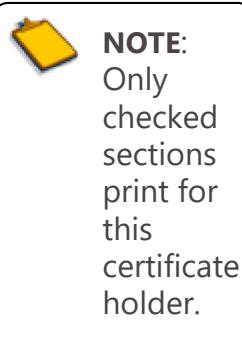
Additional remarks print on the ACORD 101 Additional Remarks Schedule.

- iii. Select the liability sections to include on the Certificate of

Liability for this certificate holder.

Click the **Check All Sections** button to select all of the liability sections.

- iv. For each selected liability, use the available drop-downs to indicate if Subrogation is waived by the certificate holder and if the certificate holder is an Additional Insured for the corresponding liability.



- v. Select whether to **Include Attachments on Print or Email.**

This selection determines whether or not selected forms (chosen from the **Certificate Holders to Print** dialog in a later step) will be attached to the certificate when you send or print it.

- vi. Click **OK** to save.

4. Click **OK** to close the **Certificate of Insurance** dialog.

A task dialog opens presenting you with options to **Print**, **Email**, or **Attach** the certificate.

5. Optional: Click **Yes** to **Print**, **Email**, and/or **Attach** Certificate(s).

OR

Click **No** to create the certificate without printing, emailing, or attaching it to the client file and return to the Certificate of Liability Insurance dialog. [Skip to step 10 to save your form.](#)

Click **Cancel** to return to the Certificate of Insurance dialog for additional changes.



NOTE: Once the Certificate is attached to the client/policy, you can perform additional actions from the [Attachments List](#), such as send the form for [HawkSoft Electronic Signature Overview](#).

The **Certificate Holders to Print** dialog opens.

6. Confirm or modify the list of certificate holders to print.
 - **Select All** and **Unselect All** can be used to check or uncheck all items in this list.
 - **Select By Section** can be used to select only those certificate holders with interests in the selected sections.

The **Select By Section** dialog opens.

This option is useful when you have multiple certificate holders in the list, but not all are associated with every liability type.

For example, you could use this dialog to select all certificate holders for Auto Liability.

7. Optional: Add additional certificate documents to print, email, or attach.

Make sure the **Include Attachments** check box is selected for the certificate holder in the upper section of the screen.

- a. Click **Add** to select additional certificate documents to print with this certificate.

The **Select Attachments** dialog opens.

- b. Select one or more attachments to include with the certificate(s), and then click **OK**.
8. Click **Print**.

The **Action to Perform** dialog opens.

[Follow on-screen prompts to modify the print and/or email settings.](#)
9. If Email was selected, follow on-screen prompts to send the certificate as an email attachment.

See [Email](#) for more information.
10. Click **OK** to close the **Edit – Certificate of Liability Insurance** dialog.
11. Click **Finish** to close the Action menu.

The [Add Log Entry Comments](#) dialog opens.
12. Add comments as needed, and then click **OK**.

To add or edit certificate holders on an existing certificate

HawkSoft recommends adding holders to the "master" certificate.

1. [Access](#) the **Edit - Certificate of Liability Insurance** wizard.
2. Select a certificate, and then click **Edit**.

The **Certificate of Insurance** dialog opens.
3. Select the **Certificate Holder** side-tab.
4. Click **Add** to open the **Add Certificate Holder** dialog.

OR

Select a certificate holder from the list, and then click **Edit** to open the **Edit Certificate Holder** dialog.
5. Complete or edit the **Contact Information** and the **Description/Other Info** tabs for the Certificate Holder, and then click **OK**.

See [To create or modify a "master" Certificate](#) for a detailed explanation of these tabs and how to print, email, or attach the certificate.

To copy an existing certificate

All certificate holder information carries over and any policy changes can then be included on the new "master" certificate.


1. [Access](#) the **Edit - Certificate of Liability Insurance** wizard.

2. Select a certificate, and then click **Copy**.

The **Certificate of Insurance** dialog opens.

3. Select the **Certificate Holder** side-tab.
4. Enter a unique **Certificate Description**.
5. Review the remaining side-tabs and modify, as needed.

To update policy information, select each side-tab and select the **Lookup** button.

Click the  at the top of any screen to access available help to create the new policy.

6. Click **OK** to close the **Certificate of Insurance** dialog.

A task dialog opens presenting you with options to **Print**, **Email**, or **Attach** the certificate.

7. Optional: Click **Yes** to **Print**, **Email**, and/or **Attach** Certificate(s).

OR

Click **No** to create the certificate without printing, emailing, or attaching it to the client file and return to the Certificate of Liability Insurance dialog box. [Skip to step 10 to save your form.](#)

Click **Cancel** to return to the Certificate of Insurance dialog for additional changes.



NOTE: Once the Certificate is attached to the client/policy, you can perform additional actions from the [Attachments List](#), such as send the form for [HawkSoft Electronic Signature Overview](#).

The **Certificate Holders to Print** dialog opens.

8. Confirm or modify the list of certificate holders to print.
 - **Select All** and **Unselect All** can be used to check or uncheck all items in this list.

- **Select By Section** can be used to select only those certificate holders with interests in the selected sections.

The **Select By Section** dialog opens.

This option is useful when you have multiple certificate holders in the list, but not all are associated with every liability type.

For example, you could use this dialog to select all certificate holders for Auto Liability.

9. Click **Print**.

The **Action to Perform** dialog opens.

[Follow on-screen prompts to modify the print and/or email settings.](#)

The copied certificate is listed on the **Edit - Certificate of Liability Insurance** dialog.

10. Click **OK**.

11. Click **Finish** to close the Action menu.

The [Add Log Entry Comments](#) dialog opens.

12. Add comments as needed, and then click **OK**.

To archive/unarchive an existing certificate

Archiving

1. [Access](#) the **Edit - Certificate of Insurance** dialog.

2. Select the certificate and click **Archive**.

A confirmation dialog appears.

3. Click **Yes** to archive.

The certificate is removed from the **Edit - Certificate of Insurance** list.

4. Click **OK** to close the **Certificate of Insurance** dialog.

5. Click **Finish** to close the Action menu.

The [Add Log Entry Comments](#) dialog opens.

6. Add comments as needed, and then click **OK**.

Unarchiving

1. [Access](#) the **Edit - Certificate of Insurance** dialog.
2. Check **Show Archived Forms** in the lower left corner.

Archived certificates are listed in red text on the **Edit - Certificate of Insurance** list.
3. Select the archived certificate, and then click **Un-Archive** to restore the certificate.



NOTE: To view the archived certificate without changing the archive status, double-click on the certificate. Click **Cancel** when done reviewing.

4. Click **OK** to close the **Edit-Certificate of Liability Insurance** dialog.
5. Click **Finish** to close the Action menu.

The [Add Log Entry Comments](#) dialog opens.
6. Add comments as needed, and then click **OK**.

To print a certificate holders list

For all certificates

1. [Access](#) the **Edit - Certificate of Liability Insurance** dialog.
2. Click **Print Certificate Holders**.

A standard **Print** dialog appears.
3. Modify settings, as needed.
4. Click **Print**.
5. Click **OK** to close the **Edit - Certificate of Insurance** dialog.
6. Click **Finish** to close the **Action** menu.

The [Add Log Entry Comments](#) dialog opens.

7. Add comments as needed, and then click **OK**.

For a specific certificate

1. [Access](#) the **Edit - Certificate of Liability Insurance** dialog.
2. Select a certificate and click **Edit**.
3. Select the **Certificate Holder** side-tab.
4. Click **Print List**.

A standard **Print** dialog appears.

5. Modify settings, as needed.
6. Click **Print**.
7. Click **OK** to close the **Certificate of Insurance** dialog.

A task dialog opens, presenting you with options to **Print**, **Email**, or **Attach** the certificate.

8. Click **No** to close the **Certificate of Insurance** dialog and return to the **Edit - Certificate of Liability Insurance** dialog.
9. Click **OK** to close the **Edit - Certificate of Liability Insurance** dialog.
10. Click **Finish** to close the Action menu.

The [Add Log Entry Comments](#) dialog opens.

11. Add comments as needed, and then click **OK**.

To print or email an existing certificate

1. [Access](#) the **Edit - Certificate of Liability Insurance** wizard.
2. Select the Certificate to print or email, and then click **Edit**.

The **Certificate of Insurance** dialog opens.

3. Click **Print** in the lower left-hand corner of the dialog.

The **Certificate Holders to Print** dialog opens.



NOTE: You will have the option to **Email** and or print when you get to the Print dialog.

4. Confirm or modify the list of certificate holders to print or email.

- **Select All** and **Unselect All** can be used to check or uncheck all items in this list.
- **Select By Section** can be used to select only those certificate holders with interests in the selected sections.

The **Select By Section** dialog opens.

This option is useful when you have multiple certificate holders in the list, but not all are associated with every liability type.

For example, you could use this dialog to select all the certificate holders for Auto Liability.

5. Optional: Add additional certificate documents to print.

Make sure the **Include Attachments** check box is selected for the certificate holder in the upper section of the screen.

- a. Click **Add** to select additional certificate documents to print with this certificate.

The **Select Attachments** dialog box opens.

- b. Select one or more attachments to include with the certificate(s), and then click **OK**.

6. Click **Print**.

The **Action to Perform** dialog box opens.

[Follow on-screen prompts to modify the print and/or email settings.](#)

7. Click **OK** to close the **Edit – Certificate of Liability Insurance** dialog box.

8. Click **Finish** to close the Action menu.

The [Add Log Entry Comments](#) dialog opens.

9. Add comments as needed, and then click **OK**.

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