Vertafore

AMS360 Office Hours, August 21: Certificates

Answered Questions:

Why doesn't policy info pull over to the COI when a new one is created. We always have to enter it manually.
If the limits were put in manually on the form in the prior version, it will not carry over upon Renewal. The limits must exist in the policy and the system data entry for the line of business has to align with the field it's going into when creating the form. If this continues, please contact Vertafore Support and we will be more than happy to assist with this.

Is there a way to get the signature included if you forget to add it when you create the cert?
Users can right click on the master cert and select Update Cert. This will allow a user to add a signature even after the form has been created.

Is there a way to attach a document outside of AMS 360 to certificate?
You can right click on the master or holder cert and select Attachments. This will then allow an attachment to the master cert or the holder cert if it's specific to the holder.

When sending multiple certificates and sending them as separate files to insured, they each come out named.   I have one customer that I sent 40+ certs to and create separate PDF files. When he received them, they are not showing the Certificate Holder name only that it is a PDF file. When I look at my sent email, they show the cert holder as the name of the PDF file
If the information is translating into your sent email without an issue, this might be an email setting on the customer's end. AMS does not dictate how a file goes from one email to another. AMS is only responsible for getting the file into an email. Email settings then take over from there.

Why can insured NOT check off additional insured boxes on Client Portal?
It is currently not a feature of Client Portal. This can be suggested through our [Ideas Portal](#) in MyVertafore as an enhancement request.

How do we create a master COI for duplication?
Master COI's are not meant for duplication. There is a Copy feature but it depends on the need so we can provide the proper workflow. Feel free to contact Customer Support at any time to get assistance with this.

Previously when we added an authorized signature it would drop the name in the signature slot. Now it is just empty. How do I get a signature on the certificate?

*Signature images are mapped to appear. The printed name is no longer mapped.
Given this is signature field, plain text was removed from this field.*

Are you going to go over the Text Setup and/or the Same as Master Description? We use that a lot----and it changes at renewal based on form changes. We use Copy Multiple Holders which is convenient, but we have to manually change the wording.
If Same as Master Description is selected for the holders, you will only need to update the Master Description of Ops after copying over the holders. Once saved, the wording will then flow through to all holders where this option is selected.

Is there a way to show the Contact information entered on Certificate holder to show on *the Certificate of Insurance?*
The ACORD 25 is currently not mapped to include contact information. This is a high ask from our customers. Support is working with our Development team to get this addressed in a future release.

When I am in a hurry I have forgotten to pick the signature. The only way I have found to put it in once the certificate is issued is to delete the certificate and start over. If there is a better way to fix that I would love to know.
Users can right click on the master cert and select Update Cert. This will allow a user to add a signature even after the form has been created.

Is there a way to get Garage Liability & Garage Keepers onto the Cert? Or is there a separate cert for this? I've looked & couldn't find one.
It depends on what information you're trying to get on the cert. There is a field at the bottom for Other policy type when creating the form that you can input this policy into.

Can you export the master list?
The Master List in the Admin Center cannot be exported. **Also covered in webinar

What is the benefit to adding cert holders in a group?
You can easily add a group of holders to a certificate upon renewal, replacement, and copy. This also prevents those groups from being deleted in the case a cert, with multiple holder's gets deleted from the system. There won't be a need for manual entry in this scenario.

Can you renew EPI's?   I have many Real Estate accounts where I have to issue these for the mtg holders
You would need to use the Update or Replace feature for this scenario for EPI's.

Under the master Cert list-ours has gotten rather large over the years & needs to be updated with correct address/email/fax etc.. what is the best way to do that?

You would have to edit the holders one by one in the Master Cert list in the Admin Center. Since this setup is meant for Additional Interest and not just a Master Holder list, there isn't a way to update just the Master Holders.

What does "AOI " set up mean?
The Additional Interest Setup in the Admin Center.

When you have an account with many certificates, and you try to expand the list, it requires date of issue or holder name. Sometimes that is not readily available. Is there another way to have the full list display?
Depends on where the list is being expanded. If it's in the tree view when in eForms Manager, you can adjust a setting to show all holder certs. This can be found under View > Refine Cert Holder View (within eForms Manager).

Please go over Text Set Up and how to easily Copy a holder (copy multiple holder) that was used from the prior year while also updating the wording. Large corporate holders require lengthy wording which stays the same annually yet the policy forms change, so we do hundreds of certificates for one client and are able to Copy Multiple holders BUT have to manually paste in the updated Text Set Up.
If Same as Master Description is selected for the holders, you will only need to update the Master Description of Ops after copying over the holders. Once saved, the wording will then flow through to all holders where this option is selected. If it's updated in the setup, you can then update the Master Cert after holders are copied over.

Can you do a name search on the cert holders once the cert has been created? Or does the list appear in alphabetical order? We have large lists of holders and it would be easier to see existing holders in alpha order
There is no way to search. The list does appear in alpha-numeric order regardless of how the entries were put in.

We have to reattach any attachments when creating new group, or Replacing Master Cert.
Attachments are specific to the form that it's attached to. They are not specific to the holder so when copying a cert or holder over, the attachments do not copy over.

Does the description show in addition to the certificate #?
Description and Certificate number are two separate fields on the form.

My address fields of certificate holder don't populate properly
First line is Holder Name. Second line is Address1 and Address2 put together. This is something we're planning on expanding in a future release.

When you are renewing a COI with multiple Cert Holders with additional insured & waiver checked on multiple policies, what would be the best way to renew the COI and be able to keep track of the AI's/Waivers's of the cert holders?
This option can be turned on for WOS. It is currently unavailable for AI's when copying holders. Best way to set this up is by adding the holders to the group setup within a Customer. Using the group upon renewal will hold those selections as long as they're marked off in the setup.

Under the General Liability policy section on the COI the Limit applies to does not flow over - no boxes ever get checked from the policy flowing over to the COI - Policy, Project, Loc how do we get this to be checked on the cert without manually doing it?
Some of these options would have to be selected on the holder or the policy. I would advise to contact Vertafore Support to get assistance with these specific fields. We would have to check what fields are being references as well as the policy and holder info to make sure it's setup properly.

How can I add my name to sign in the certificate?
Only a signature will appear as long as one has been included in your employee profile. Printed name no longer appears in the signature box.

Previously when you put in the authorized signer, it dropped in a name on the certificate, now it is blank, How do I set up a signature for the certificates I email?
Only a signature will appear as long as one has been included in your employee profile. Printed name no longer appears in the signature box.

The Activity Options under Distribute Certificates allows certain options to be changed. But these changes only apply to this particular Activity. Where do we go to change the default Activity Options on a global basis so that we do not have to make an individual change each time we distribute a Certificate?
You can go into the Admin Center > Activity/Suspense Setup > Checkpoints. Checkpoints will automatically trigger activites when doing the specified action. Please contact Vertafore Support for more detail.

You mentioned you're working with Acord on adding in the Contact information that does not print. What about the email section? The email listed in the holder detail used to print on the certificates and now it stopped printing with a recent update.
The email section is part of this ask. We would like users to have to option to include all info listed under the contact information.

If you already have certs created and you did not check write to cert holders list do you have to go back and check each one individually or can you do it as a group?
Yes, this is specific to each holder so it would need to be selected per holder.

What is the purpose of grouping with certs?

You can easily add a group of holders to a certificate upon renewal, replacement, and copy. This also prevents those groups from being deleted in the case a cert with multiple holders gets deleted from the system. There won't be a need for manual entry in this scenario.

I have over 400 COI's for renewal for one client. I have a lot of contractors that are the holders and some contractors have many COI's. Each holder can have specific wording that may different depending on the jobs. Is there a simple way of sending these renewal COI's rather than by each one? Thanks
In this specific scenario, there wouldn't be a way for a global renewal. Since each is specific to wording and their needs, it will have to be done manually. The only way to prevent this in the future is to use the groups feature on the customer level.

What is the difference between replace and update?
Replace writes over the current cert. Update will update new policy info based on the transaction. You can also use update to change holder info, Description of Ops, and the signature used. Replace will allow you to change everything and write over the prior version.

What about amending the description of operations with each renewal group, so that it updates every holder?
You would need to make sure Same as Master Description is checked on the holder level. If this is the case, you would only need to update and save the description on the master level.

If you are running an older version of office can you still populate an excel list and import. It just won't be supported by AMS
If it isn't a supported version of Office, we cannot guarantee it will work. It was not made to work with unsupported versions of software.

When you replace a cert, does the old one remain in the system in case you need to see what was sent out?
It will replace the old one. Unless saved elsewhere, you will not have record of the old cert.

Is there a maximum number of holders you can have on one Master Cert?
No.