



## Certificate of Insurance Instructions

### ISSUING A CERTIFICATE THROUGH CSR24

#### Steps to Issue a Certificate

- 1) Login into the CSR24 Service Center: <https://www.i-csr.net/active/signon.asp>
- 2) Click on the “Service Menu” link on the top right of the page.
- 3) Click “Certificate of Insurance”. A list of Certificate Templates will appear.
- 4) Select the desired template. The template information will display for review.
- 5) Click “Submit Request” on the top of the screen. A list of holders will display.
- 6) Locate the holder record. If you need to add a new holder, see “Entering a New Holder” instructions and skip steps 10-14.
- 7) Select “Copy” to the right of the holder record.
- 8) Remove the words “Copy of” in the holder name field.
- 9) Update the description of operations.

Description of Operations	
Certificate Portion	Your Location Info will be Prefilled Here
Holder Specific Portion:	Type your unit number/address; Unit Owner Name; Loan number; here Example: Unit # Xxx; Owner John Doe; loan # *xxx

- 10) Confirm the holder & delivery information. Please read Popup Blocker information below.
- 11) Click Submit Request.

The Certificate will automatically be sent to all recipients entered. If you check to “view on screen”, click on the “Certificate” link on the popup box to view/print a copy of the Certificate.

**Popup Blocker: Please note that if “view on screen” is selected, you need to turn off your popup blocker before selecting “Submit Request”.**

#### To Enter a New Holder (See Certificate Holder Import for multiple holders at once)

- 1) From the “Certificate Holder Selection List”, click Add.
- 2) Enter the Certificate Holder information:
  - **One Time only:** If checked, the holder will not appear on the holder or certificate holder renewal list.
  - **Do they Receive Renewals:** Be sure to check this box if they may be renewed
  - **Date Interest Ends:** Used if the “One Time Only” box is checked.
  - **Holder Specific Potion:** This information will be retained for all certificates issued to this holder, by this Insured.
- 3) Enter the Your Delivery Information:
  - **Your email address:** This is the email address that the certificate will appear to be sent by.
  - **Send me Confirmation:** Check, if you want to receive a confirmation email
  - **View on screen:** Check to view/print certificate (See Adobe print settings below)
- 4) Enter the Recipients of the Certificate of Insurance. There may be up to three recipients.
- 5) Click “Submit Request” on the bottom of the screen.

If you selected “view on screen”, click on the “Certificate” link in the popup window to view the Certificate.



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### **To Resend Previously Issued Certificates**

- 1) After selecting an Insured, click Forms.
- 2) Click "Issue a Certificate of Insurance".
- 3) Check the radio button "Previously Issued Certificates" in the find section of the selection list.
- 4) From the list of previously issued Certificates, locate the certificate you are looking for. Select the certificate by clicking on the certificate or holder name.
- 5) Click "Submit Request" on the top left of the screen.
- 6) Update the delivery information if necessary.
- 7) Click "Submit request".

The Certificate will automatically be sent to all recipients entered. If you selected "view on screen", click on the "Certificate" link in the popup window to view a copy of the Certificate.

### **If you are printing the Certificate to be mailed:**

- Verify your Adobe print settings for window envelopes
- You may need to print a PDF file to reset if you need different options.
- Make sure the selected printer is the correct one.
- Verify the settings of the following two items on the Adobe Print dialog window (the window that pops up when you select the print feature in Acrobat) Page Handling section:
  - "Page Scaling" Set to: **None**. The form is the full 8.5 x 11."
  - "Auto-rotate and center pages" should be checked. If this is not checked, the form will typically cut off on the right.

Note: by not correcting the setting above the certificate will not fold correctly for the address to show in a window envelope.