

How to Create a Certificate of Insurance in Applied Epic

A certificate of insurance confirms the coverage limits and policy details held by your agency's clients. This guide walks you through how to create a certificate of insurance in Applied Epic, from building a master certificate template and adding policies, to setting up certificate holders and issuing the finished certificate.

Prerequisites

- The current policy must already exist in the Applied Epic system before you begin.
- Coverage limits must be entered on the policy application so they can populate the certificate automatically.
- Access to **Proofs of Insurance** for the relevant client.

Create the master certificate

1. Verify the current policy exists in Epic

Before creating a certificate, confirm that the current policy is present in the system and that your coverage limits have been entered on the application. This information automatically pulls into the certificate, so accuracy here saves rework later.

The screenshot displays the Applied Epic software interface for a client named Redbud Gardens. The 'Policies' section is active in the left sidebar. The main table lists various policies, with 'General Liability' (Line 1234) highlighted in blue. Below the table, the 'Policy Detail' and 'Line Detail' sections are visible, showing contract information and a service summary.

Line	Agency	Branch	Policy Description	Status Description	Policy Number	ICO	PPE	Effective	Expiration	Bill	Line Estimated Pr...	Line Annual
AGGR	ASN	TRA	Agriculture Package	New Policy	TBD	NATWID	NATWID	10/30/2019	10/30/2020	D	\$1,000.00	
CA-S	ASN	TRA	Business Auto	Change to Policy	12345	LLOOF1	JMWIL1	5/1/2019	5/1/2020	A	\$4,500.00	
PCKG	ASN	TRA	Commercial Package	New Policy	1234			3/13/2019	3/13/2020	D		
PROP	ASN	TRA	Commercial Package	New Policy	1234	NEWBU1	NEWBU1	3/13/2019	3/13/2020	D	\$0.00	
GL-S	ASN	TRA	Commercial Package	New Policy	1234	NEWBU1	NEWBU1	3/13/2019	3/13/2020	D	\$0.00	
GD-S	ASN	TRA	Garage and Dealers	New Policy	PENDING	NEWBU1	NEWBU1	1/23/2020	1/23/2021	D	\$0.00	
GL-S	ASN	TRA	General Liability	New Policy	1234	LLOOF1	CALFA1	6/26/2019	6/26/2020	D	\$10,000.00	
GL-S	ASN	TRA	General Liability	Renewal	1234	LLOOF1	CALFA1	6/26/2020	6/26/2021	D	\$10,000.00	
LIQL	ASN	TRA	Liquor Liability	New Policy	TEST	NEWBU1	NEWBU1	11/5/2019	11/5/2020	D	\$0.00	
LIQU	ASN	TRA	Liquor Liability with custom app	New Policy	TEST	CENMUT	UCAGE1	11/26/2019	11/26/2020	D	\$1,500.00	
AUTO	ASN	TRA	Personal Automobile	New Policy	1111111*	AAAIN1	AAAIN1	8/15/2019	8/15/2020	D	\$11.00	

Policy Detail

Contracted: 6/26/2020 - 6/26/2021
Effective: 6/26/2020 - 6/26/2021
Type: GL-S - General Liability
Source: SIC 8041
NAICS 62131
Balance Agency - \$0.00

Line Detail

Bill: Direct
Invoice to: Client - Redbud Gardens Test C...
999 Main Street
Burr Ridge, IL 60527
Status: REN - Renewal
ICO: LLOOF1 - Lloyds of London
PPE: CALFA1 - California Fair Plan
Comments:

Service Summary

#	Entered	Action	Description	Stage	Effective	Stage Changed	Changed By	Entered By
1	02/10/2020	Renew	General Liability	Issued	6/26/2020	02/10/2020	Katherine Eraci	Katherine Eraci

Applied Epic | Copyright 2019 Applied Systems, Inc. | Insured | Active | Account Balance: \$0.00 | ALLEG01_PROD | 0.09% | POLVIEW

Policies screen showing a list of policies, with "General Liability" highlighted and policy details visible below.

2. Navigate to Proofs of Insurance

In the left navigation panel, click **Proofs of Insurance**, then select **Certificates**. Review the list of existing certificates before creating a new one to avoid duplicates.

The screenshot shows the 'Applied Epic' software interface. The left navigation panel has 'Proofs of Insurance' selected. The main window displays a table of certificates. The 'GL-S' certificate is highlighted, and its details are shown below the table.

Line	Agency	Branch	Policy Description	Status Description	Policy Number	ICO	PPE	Effective	Expiration	Bill	Line Estimated P.C.	Line Annual
AGGR	ASN	TRA	Agriculture Package	New Policy	TBD	NATWID	NATWID	10/30/2019	10/30/2020	D	\$1,000.00	
CA-S	ASN	TRA	Business Auto	Change to Policy	12345	LLOOF1	JMWIL1	5/1/2019	5/1/2020	A	\$4,500.00	
PCPK	ASN	TRA	Commercial Package	New Policy	1234			3/13/2019	3/13/2020	D	\$0.00	
PROP	ASN	TRA	Commercial Package	New Policy	1234	NEWBU1	NEWBU1	3/13/2019	3/13/2020	D	\$0.00	
GL-S	ASN	TRA	General Liability	Renewal	1234	LLOOF1	CALFA1	6/26/2020	6/26/2021	D	\$10,000.00	
LIQL	ASN	TRA	Liquor Liability	New Policy	TEST	NEWBU1	NEWBU1	11/5/2019	11/5/2020	D	\$0.00	
LIQU	ASN	TRA	Liquor Liability with custom app	New Policy	TEST	CENMUT	UCAGE1	11/26/2019	11/26/2020	D	\$1,500.00	
AUTO	ASN	TRA	Personal Automobile	New Policy	111111*	AAAIN1	AAAIN1	8/15/2019	8/15/2020	D	\$11.00	

Policy Detail

Contracted: 6/26/2020 - 6/26/2021
Effective: 6/26/2020 - 6/26/2021
Type: GL-S - General Liability
Source: SIC 8041, NAICS 62131
Balance: Agency - \$0.00

Line Detail

Bill: Direct
Invoice to: Client - Redbud Gardens Test C...
999 Main Street
Burr Ridge, IL 60527
Status: REN - Renewal
ICO: LLOOF1 - Lloyds of London
PPE: CALFA1 - California Fair Plan

Service Summary

#	Entered	Action	Description	Stage	Effective	Stage Changed	Changed By	Entered By
1	02/10/2020	Renew	General Liability	Issued	6/26/2020	02/10/2020	Katherine Eraci	Katherine Eraci

Proofs of Insurance section selected, with the Certificates tab open and a list of master certificates and their details.

3. Add a new certificate

Click **Add a Certificate** under the Certificates section. In the **Add Certificate** screen:

- **Type:** Select "ACORD Certificate of Liability Insurance" from the dropdown.
- **Title:** Enter a certificate name, such as **2020-21 Master Certificate**.

Click **Finish** to proceed.

The screenshot displays the Applied Epic software interface. The top menu bar includes File, Edit, Areas, Home, Locate, Actions, Real-Time, On Demand, Access, Links, myEpic, and Help. The left sidebar shows a navigation menu with options like Account Detail, Contacts, Opportunities, Client Contracts, Policies, and General Liability. The main window displays a table of policies with columns for Line, Agency, Branch, Policy Description, Status Description, Policy Number, ICO, PPE, Effective, Expiration, Bill, Line Estimated Pct., and Line Annual. The selected policy is a General Liability policy (Line 1234) with a status of Renewal. Below the table, the Policy Detail section shows the policy's effective date (6/26/2020), type (GL-S - General Liability), and other details. The Service Summary section shows a table with columns for #, Entered, Action, Description, Stage, Effective, Stage Changed, Changed By, and Entered By.

Line	Agency	Branch	Policy Description	Status Description	Policy Number	ICO	PPE	Effective	Expiration	Bill	Line Estimated Pct.	Line Annual
AGGR	ASN	TRA	Agriculture Package	New Policy	TBD	NATWID	NATWID	10/30/2019	10/30/2020	D	\$1,000.00	
CA-S	ASN	TRA	Business Auto	Change to Policy	12345	LLOOF1	JMWIL1	5/1/2019	5/1/2020	A	\$4,500.00	
PCGG	ASN	TRA	Commercial Package	New Policy	1234	NEWBU1	NEWBU1	3/13/2019	3/13/2020	D	\$0.00	
PROP	ASN	TRA	Commercial Package	New Policy	1234	NEWBU1	NEWBU1	3/13/2019	3/13/2020	D	\$0.00	
GL-S	ASN	TRA	General Liability	New Policy	1234	LLOOF1	CALFA1	6/26/2019	6/26/2020	D	\$1,000.00	
GL-S	ASN	TRA	General Liability	Renewal	1234	LLOOF1	CALFA1	6/26/2020	6/26/2021	D	\$10,000.00	
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LIQU	ASN	TRA	Liquor Liability with custom app	New Policy	TEST	CENMUT	UCAGE1	11/26/2019	11/26/2020	D	\$1,500.00	
AUTO	ASN	TRA	Personal Automobile	New Policy	111111*	AAAIN1	AAAIN1	8/15/2019	8/15/2020	D	\$11.00	

Policy Detail

Contracted: Direct
Effective: 6/26/2020 - 6/26/2021
Type: GL-S - General Liability
Source: SIC 8041
NAICS 62131
Balance: Agency - \$0.00

Line Detail

Bill: Direct
Invoice to: Client - Redbud Gardens Test C...
999 Main Street
Burr Ridge, IL 60527
Status: REN - Renewal
ICO: LLOOF1 - Lloyds of London
PPE: CALFA1 - California Fair Plan
Comments:

Service Summary

#	Entered	Action	Description	Stage	Effective	Stage Changed	Changed By	Entered By
1	02/10/2020	Renew	General Liability	Issued	6/26/2020	02/10/2020	Katherine Eraci	Katherine Eraci

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Add Certificate screen with "ACORD Certificate of Liability Insurance" selected and "2020-21 Master Certificate" entered as the title.

4. Add policies to the certificate

In the navigation panel, select the policy or policies you want to add to the certificate. For example, select the most current **General Liability** policy. Enter a description, such as **2020-21 GL**, and confirm the correct policy term is selected (for example, Effective: 6/26/2020, Expiration: 6/26/2021, Policy Number: 1234).

Certificate template screen with the General Liability policy selected, description "2020-21 GL," and policy term details filled in.

5. Set the certificate as a default template

Check the **Default template** box. This ensures that when you add a new holder later in the term, the coverage limits populate automatically. Confirm all policy limits and details are correct:

- Each occurrence: 1,000,000
- Damage to rented premises (each occurrence): 100,000
- Medical expense (any one person): 5,000
- Personal and advertising injury: 1,000,000
- General aggregate: 2,000,000

- Products – completed/operations aggregate: 2,000,000

The screenshot displays the 'Available Templates' screen in the APPLIED Epic software. The interface includes a top navigation bar with options like File, Edit, Areas, Home, Locate, Actions, Real-Time, On Demand, Access, Links, myEpic, and Help. A left sidebar lists various menu items such as Account Detail, Contacts, Opportunities, Client Contracts, Policies, Proofs of insurance, Binders, Certificates, and Transactions. The main content area shows the 'Available Templates' section with a table of templates. The 'Default template' checkbox is checked. Below this, the 'Type of Insurance/Limits' section is visible, showing 'Commercial general liability' selected under 'Type of Insurance'. The 'Limits' section displays various coverage limits, including 'Products - completed/operations aggregate' set to 2,000,000.

Certificate template screen with "Default template" checked and all policy limits filled in.

6. Review and save the master certificate

Double-check all entered information for accuracy, then save the certificate. Once saved, you have successfully added a master certificate of insurance for the current policy term, and the default template will streamline future certificate issuance for additional holders.

Add additional policies

7. Add other policy types to the certificate

After adding the most current General Liability policy, add any other relevant policies. In the left navigation panel under **Proofs of Insurance > Certificates**, select the next policy type you want to add, such as **Work Comp Employers Liability**. You can also add policies such as **Automobile Liability**, **Excess Umbrella Liability**, **Professional Liability**, or **Cyber Liability** as needed.

The screenshot shows the Applied Epic software interface. The left navigation panel has 'Proofs of Insurance' selected, and 'Certificates' is expanded. Under 'Certificates', 'Liability - 2/10/2020' is selected, and 'General Liability' is highlighted. The main area shows the 'Available Templates' section with a table listing templates. The 'General Liability - 6/26/2020 - 6/26/2021' template is selected. The 'Type of Insurance/Limits' section is visible, showing options for 'Commercial general liability' and 'Claims made'. The 'Limits' section is also visible, showing various limit amounts.

Work Comp Employers Liability section selected, ready to add a new policy with empty fields for limits and exclusions.

8. Enter Workers Compensation policy details

In the **Line of business** dropdown, select **WCOC**, then set the policy term (for example, **1/26/2020 - 1/26/2021**). In **Service summary**, select the appropriate entry, such as **1/26/2020 - Renew - Worker's Compensation - Issued**. Enter a description, such as **2020-21 WC**, and check **Default template** so this policy is included for all holders added during the term.

In the **Type of Insurance** section, answer the exclusion question: for "Any proprietor/partner/executive officer/member excluded?", select **No**. Then enter the following limits:

- **Employer's liability – each accident: 1,000,000**

- Employer's liability disease – each employee: 1,000,000
- Employer's liability disease – policy limit: 1,000,000

REDBGAR-01 - Redbud Gardens Test Client

File Edit Areas Home Locate Actions Real-Time On Demand Access Links myEpic Help

APPLIED

Home Locate Actions Real-Time On Demand Access Links myEpic Appetite IVANS New Print Save Undo Logout

Account Detail
Contacts
Opportunities
Client Contracts
Policies
Proofs of Insurance

Binders
Certificates
Liability - 2/10/2020
Insured
General Liability
Automobile Liability
Excess Umbrella Liability
Work Comp Employers Liability
Other 1
Other 2
Description of Operations
Attachments
Holders
Remarks
Evidences
Premium Processing
Transactions
Attachments
Claims
Activities

Primary Additional

Available Templates

Description	Line	Policy Number	Effective	Expiration

Include history Include all lines of business

Line of business WCOC - 1/26/2020 - 1/26/2021

Service summary 1 1/26/2020 - Renew - Worker's Compensation - Issued

Description 2020-21 WC

Default template

Type of Insurance Limits

Any proprietor/partner/executive officer/ member excluded? No

If yes, describe under special provisions on the description of operations tab

Per statute Other

Employer's liability - each accident 1,000,000

Employer's liability disease - each employee 1,000,000

Employer's liability disease - policy limit 1,000,000

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Workers Compensation policy details filled in, with "Default template" checked, exclusion set to "No," and all limits entered as 1,000,000.

Add certificate holders

9. Open the Holders section

Once all desired policies are added, navigate to the **Holders** section in the left navigation panel under the certificate, and click **Holders** to open the holders management screen.

The screenshot shows the 'Holders' management screen in the Applied Epic software. The left navigation panel is open, showing the 'Holders' section selected under 'Certificates'. The main area displays a table with 'No items found'. Below the table is a form to add a new holder. The form includes fields for 'Name', 'Address', 'Phone', 'Fax', and 'Distribute via'. There is also a 'Templates for this Holder' section with dropdowns for 'General liability', 'Automobile liability', 'Excess/umbrella liability', 'Workers comp/empl liab', 'Other 1', and 'Other 2'. An 'Include ACORD 855 NY' checkbox is present. At the bottom, there is an 'Email Recipients' section with fields for 'Contact Name', 'Email Address', 'To', 'CC', 'BCC', and 'Primary'.

Holders section selected, ready to add a new holder with empty fields for name, address, and templates for this holder.

Click **Add** to create a new holder entry. Enter the holder's **Name** (for example, [Village of Crestwood](#)) and address (for example, [100 Tower Drive, Crestwood, IL 60418, United States of America](#)). Optionally fill in the **Phone** and **Fax** fields, and set **Distribute via** (for example, [Print](#)). Under **Templates for this Holder**, verify the correct templates are assigned, such as:

- **General liability:** [2020-21 GL](#)
- **Workers comp/empl liab:** [2020-21 WC](#)

Any other policy templates you previously added will also appear here.

The screenshot displays the 'Holders' section of the APPLIED software. The left sidebar shows the navigation menu with 'Holders' selected. The main area is divided into two tabs: 'Holder' and 'Templates for this Holder'. The 'Holder' tab shows the details for 'Village of Crestwood', including its address and contact information. The 'Templates for this Holder' tab shows the selected policy templates for General liability and Workers comp/empl liab.

Holder	Description of Operations	Documents Attached	Holder Details	ACORD 855 NY
Village of Crestwood			100 Tower Drive Crestwood, IL 60418 United States of America	General liability: 2020-21 GL Automobile liability: Excess/umbrella liability: Workers comp/empl liab: 2020-21 WC Other 1: Other 2: ☐ Include ACORD 855 NY

Holder details being entered for "Village of Crestwood," with address and templates for General Liability and Workers Comp populated.

10. Choose the most efficient contact method

Although you can enter the holder's fax number, it is recommended to obtain and use the holder's email address for distribution. In the **Distribute via** dropdown, select [Email](#) for more efficient delivery.

The screenshot displays the 'Holder Details' screen in the Applied Epic software. The interface includes a top menu bar with options like File, Edit, Areas, Home, Locate, Actions, Real-Time, On Demand, Access, Links, myEpic, and Help. A left sidebar contains a navigation tree with categories such as Account Detail, Contacts, Opportunities, Client Contracts, Policies, Proofs of Insurance, Binders, Certificates, and Liability - 2/10/2020. The main content area is divided into several sections: 'Holders' with a search bar, 'Holder/Template' tabs, 'Holder' details (including Name, Address, Phone, Fax, and Distribute via dropdown), 'Templates for this Holder' (with dropdowns for General liability, Automobile liability, Excess/umbrella liability, Workers comp/empl liab, Other 1, and Other 2), and 'Email Recipients' at the bottom. The 'Distribute via' dropdown is currently set to 'Print', but the instruction indicates it should be set to 'Email'. The 'Email Recipients' section shows a table with columns for Contact Name, Email Address, To, CC, BCC, and Primary.

Holder details screen with "Distribute via" set to "Email" and fields for phone, fax, and email recipients visible.

11. Add email recipients for the holder

Click **Add** in the **Email Recipients** section. In the **Contact Select** window, choose **Manual contact** and enter the holder's email address (for example, training@asnoa.net). Select whether this address should be the primary email, and assign the recipient as **To**, or use **CC** or **BCC** if you want to send a copy or blind copy. Click **Finish** to add the recipient.

The screenshot displays the 'Contact Select' window within the Applied Epic software. The window is titled 'Contact Select' and features a search bar at the top. Below the search bar, there are tabs for 'Holder/Template', 'Description of Operations', 'Documents Attached', and 'Holder Details'. The 'Holder/Template' tab is currently selected, showing details for a holder named 'Village of Crestwood'. The holder's address is '100 Tower Drive, Crestwood, IL 60418', and the phone number is '(630) 908-4226'. To the right of the holder details, there are dropdown menus for selecting templates for various liability types: General liability (2020-21 GL), Automobile liability, Excess/umbrella liability, Workers comp/empl liab (2020-21 WC), Other 1, and Other 2. There is also a checkbox for 'Include ACORD 855 NY'. Below the holder details, there is a section for 'Email Recipients' with a table that has columns for 'Contact Name', 'Email Address', 'To', 'CC', 'BCC', and 'Primary'. The 'Primary' column has a dropdown menu with 'Primary' and 'Additional' options. The bottom of the window shows a status bar with 'Applied Epic | Copyright 2019 Applied Systems, Inc.', 'Insured', 'Active', 'Account Balance: \$0.00', 'ALLEG01_PROD', '0.13s', and 'CERTHOLD'.

Contact Select window open, "Manual contact" selected, email address "training@asnoa.net" entered, with options for To, CC, BCC, and Primary email visible.

12. Enter description of operations and special wording

Click the **Description of Operations** tab. In the description field, enter any required additional insured wording or special instructions, such as: "This holder is made additional insured but only as respects to the operations of the named insured." Always have an underwriter approve special wording before entering it. Optionally, check **Print Holder Summary** if you want this summary to appear on the printed certificate.

The screenshot displays the Applied Epic software interface. The left sidebar contains a navigation menu with options like Account Detail, Contacts, Opportunities, Client Contracts, Policies, Proofs of Insurance, Binders, Certificates, and others. The main window shows the 'Description of Operations' tab for a holder entry. The 'Name' field is 'Village of Crestwood' and the 'Address 1' is '100 Tower Drive'. The 'Description of Operations' field contains the text: 'This holder is made additional insured but only as respects to the operations of the named insured'. The 'Print Holder Summary' checkbox is checked. The bottom status bar shows 'Form Edition: ACORD 25 (2016/03)' and 'Account Balance: \$0.00'.

Description of Operations tab open, with additional insured wording entered in the description field.

13. Attach supporting documents (if needed)

If you need to add supporting documents, use the **Documents Attached** tab. You can attach files from your desktop or from the customer's attachments within Applied Epic.

14. Review and save the holder entry

Double-check all entered information for accuracy and confirm the correct templates are assigned to the holder. Save the holder entry to complete the process. With this, you have successfully added additional policies and set up certificate holders, ensuring each holder receives the correct coverage information.

15. Add additional holders as needed

To add more certificate holders during the policy term, click **Add** in the holders section again for each new holder. If you have a large number of holders, use the **Import** function to add them in bulk.

Review holder details

16. Navigate to the Holder Details tab

In **Proofs of Insurance > Certificates** for the relevant liability policy, select the **Holder Details** tab. Review the **Additional Insured On** and **Subrogation Waived On** sections. Only check boxes for General liability, Automobile liability, Excess/umbrella liability, or other coverages if you have explicit approval from the carrier.

In this example, **General liability** is checked under **Additional Insured On**, and **Workers comp/empl liab** is checked under **Subrogation Waived On**. The **Named Insured** section displays the client name and address (for example, Redbud Gardens Test Client, 999 Main Street, Burr Ridge, IL 60527).

Holder Details tab with checkboxes for Additional Insured and Subrogation Waived, and client information filled in.

Issue the certificate

17. Start the Issue Certificate action

Navigate to the **Actions** menu and select **Issue Certificate**. Enter all required information, ensuring it is accurate and complete. Only include additional insured wording if it is specifically requested or required.

18. Select the producer and contact name

In the **Issue Certificate** dialog, under the **Holder Distribution** tab, locate the **Producer** dropdown next to the selected holder (for example, Redbud Gardens Test Client). Click the dropdown and select the appropriate producer from the list (for example, Joseph Kobel, Katherine Bova, Nicholas Petrocelli, Russel Kobel). Enter or select the **Contact name** at the top right (for example, Joseph Kobel), and ensure the **Scanned signature** field is populated (for example, Katherine Bova).

The screenshot shows the 'Issue Certificate' dialog box with the 'Holder Distribution' tab selected. The 'Distribute To' section lists 'Redbud Gardens Test Client' and 'Village of Crestwood'. The 'Producer' dropdown is open, showing options: Joseph Kobel, Katherine Bova, Nicholas Petrocelli, and Russel Kobel. The 'Scanned signature' field is populated with 'Katherine Bova'. The 'Contact' field is also populated with 'Katherine Bova'. The 'Email/Fax Details' section shows the 'From' field as 'keraci-bova@asnoa.net' and the 'Signature' field as 'Katherine Bova'. The 'Message' field contains the text: 'Katherine M. Bova, SBSCS Vice President of Education 630-908-4276'. The 'Finish' button is highlighted in green.

Producer dropdown open with options, contact name field being edited, and signature field visible.

19. Configure certificate distribution

Still in the **Holder Distribution** tab, under **Distribute To**, select the holders who should receive the certificate (for example, Redbud Gardens Test Client, Village of Crestwood). In **Delivery Options**, set the contact (for example, Redbud Gardens) and choose the delivery method (for example, Email). In **Email/Fax Details**, enter the recipient's email address in the **To** field (for example, info@redbudgardens.com). The sender's email and signature (for example, Katherine Bova) populate automatically.

The screenshot shows the 'Issue Certificate' dialog box in the Applied Epic system. The 'Holder Distribution' tab is active, displaying a table with two selected holders: 'Redbud Gardens Test Client' and 'Village of Crestwood'. Below the table, the 'Delivery Options' section shows the contact set to 'Redbud Gardens' and the delivery method set to 'Email'. The 'Email/Fax Details' section shows the 'From' field populated with 'kerraci-bova@asnoa.net' and the 'To' field with 'info@redbudgardens.com'. The 'Subject' field is empty. The 'Message' field contains a signature block for Katherine M. Bova, SBSC, Vice President of Education, with the phone number 630-908-4226. The dialog box has 'Preview', 'Finish', and 'Cancel' buttons at the bottom.

Issue Certificate dialog with the Holder Distribution tab, email fields, and delivery options visible.

Verify that both the holder (for example, Redbud Gardens Test Client) and the insured are checked in the **Distribute To** list. If you preview the certificate without both selected, the preview will be blank. Confirm the **Contact** and **Via** (delivery method) fields are set (for example, Contact: Redbud Gardens, Via: Email), and double-check the **To** email address field (for example, keraci-bova@asnoa.net).

Issue Certificate

Organization Contact

Name ASNOA License # Contact name Joseph Kobel

Forms Organization Contact Holder Distribution

Distribute To

Holder	Summary	Contact
☒ Redbud Gardens Test Client		Redbud Gar
☐ Village of Crestwood		

Holder Redbud Gardens Test Client Producer ERAKAT Katherine Bova

Scanned signature Katherine Bova ☐ Print holder attachments ☐ Issue insured copy only

Delivery Options

Contact Redbud Gardens

Via Email Deliver ☒ Now ☐ Schedule

Email/Fax Details

From keraci-bova@asnoa.net Change Sender Signature Katherine Bova Refresh

To... keraci-bova@asnoa.net

Cc...

Bcc...

Subject

Message

Katherine M. Bova, SBSCS
Vice President of Education
630.908.4226

Preview Finish Cancel

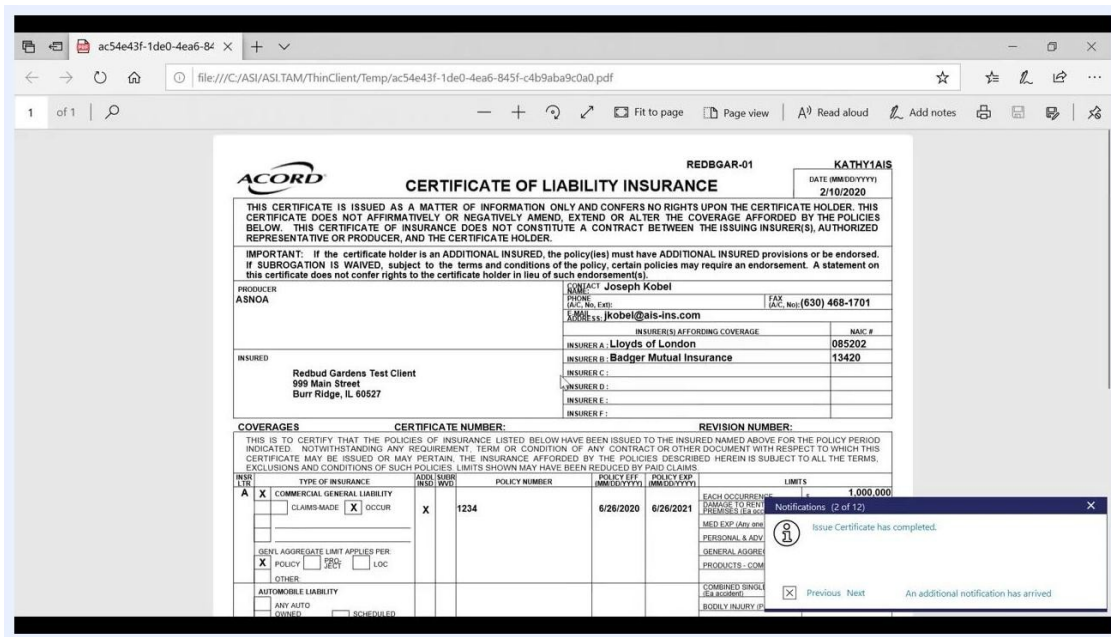
Holder and insured selected, contact and email fields filled in, ready for preview.

You can issue the certificate without distributing it, or print and mail it instead of emailing it. If an error appears (for example, "The Microsoft Exchange administrator has made a change that requires you quit and restart Outlook"), click **OK** and resolve any email client issues before proceeding.



21. Compose the email message

In **Email/Fax Details**, enter a clear subject, such as "Certificate of Insurance." In the **Message** field, type a brief message, such as "Hello, Please find attached Certificate as requested." Ensure your Outlook signature is included at the bottom of the message (for example, "Katherine M. Bova, SBCS, Vice President of Education, 630-908-4226").



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file:///C:/ASI/TAM/ThinClient/Temp/ac54e43f-1de0-4ea6-845f-c4b9aba9c0a0.pdf

1 of 1 | 🔍

Fit to page Page view Read aloud Add notes

ACORD REDBGAR-01 KATHYIAIS
DATE (MMDDYYYY) 2/10/2020

CERTIFICATE OF LIABILITY INSURANCE

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER: ASNOA
CONTACT: Joseph Kobel
PHONE (A/C, H/L, EXT):
FAX (A/C, H/L): (630) 468-1701
EMAIL: jkobel@ais-ins.com

INSURERS AFFORDING COVERAGE: Lloyd's of London 085202
INSURER C: Badger Mutual Insurance 13420

INSURED: Redbud Gardens Test Client
999 Main Street
Burr Ridge, IL 60527

CERTIFICATE NUMBER: 1234 REVISION NUMBER: 6/26/2021

COVERAGES: THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

LINE	TYPE OF INSURANCE	ADD. TAGS	POLICY NO.	POLICY EFF. DATE	POLICY EXP. DATE	LIMITS
A	COMMERCIAL GENERAL LIABILITY		1234	6/26/2020	6/26/2021	1,000,000
	CLAIMS MADE ☒ OCCUR ☒					
	GEN'L AGGREGATE LIMIT APPLIES PER					
	☒ POLICY ☐ PER ☐ LOC ☐ OTHER					
	AUTOMOBILE LIABILITY					
	ANY AUTO ☐ SCHEDULED ☐					

EACH OCCURRENCE DAMAGE TO RENT/ PREMISES (See sec.)
MED. EXP. (Any amt)
PERSONAL & ADV.
GENERAL AGGRE.
PRODUCTS - COM.
COMBINED SINGLE ACCIDENT
BODILY INJURY (P)

Notifications (2 of 12)
Issue Certificate has completed.

Previous Next An additional notification has arrived

Email subject and message fields filled in, with the signature visible in the message body.

22. Apply the message to multiple holders

If you want to use the same email message for multiple holders, click **Apply To** next to the message field. Confirm the message (for example, "Hello, Please find attached Certificate as requested.") is correctly applied to all selected holders.

The screenshot shows a web browser window with a PDF document titled "CERTIFICATE OF LIABILITY INSURANCE". The document is issued by ACORD and contains the following information:

- PRODUCER:** ASNOA
- CONTACT:** Joseph Kobel, jkobel@ais-ins.com, (630) 468-1701
- INSURED:** Redbud Gardens Test Client, 999 Main Street, Burr Ridge, IL 60527
- INSURERS:** Lloyds of London (Policy # 085202), Badger Mutual Insurance (Policy # 13420)
- COVERAGES:** Commercial General Liability, Automobile Liability, etc.
- LIMITS:** \$1,000,000 per occurrence, \$100,000 per person, etc.

Apply To link highlighted in the Issue Certificate dialog, with the message field visible.

23. Preview and review the certificate

Click **Preview** at the bottom of the Issue Certificate dialog to review the generated certificate PDF. Confirm that all details are correct, including:

- Certificate holder (for example, Redbud Gardens Test Client)
- Producer (for example, ASNOA)
- Contact information (for example, Joseph Kobel, jkobel@ais-ins.com)
- Insured details (for example, Redbud Gardens Test Client, 999 Main Street, Burr Ridge, IL 60527)
- Insurers (for example, Lloyds of London, Badger Mutual Insurance)
- Policy numbers, effective/expiration dates, and coverage limits (for example, Policy #1234, 6/26/2020–6/26/2021, \$1,000,000 each occurrence)

Check for notifications confirming certificate issuance, such as "Issue Certificate has completed."

CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER: ASNOA

INSURED: Redbud Gardens Test Client
999 Main Street
Burr Ridge, IL 60527

CONTACT: Joseph Kobel
PHONE: (630) 468-1701
FAX: (630) 468-1701
EMAIL: jkobel@ais-ins.com

INSURER(S) AFFORDING COVERAGE: Lloyd's of London, Badger Mutual Insurance

CERTIFICATE NUMBER: 1234

REVISION NUMBER: 085202

COVERAGES:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

TYPE OF INSURANCE	ADDITIONAL INSURED	POLICY NUMBER	POLICY EFF. DATE	POLICY EXP. DATE	LIMITS
☒ COMMERCIAL GENERAL LIABILITY	☒ CLAIMS MADE ☒ OCCUR	1234	6/26/2020	6/26/2021	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (per occurrence) \$ 100,000 MED. EXP. (Any one person) \$ 5,000 PERSONAL & ADV. INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG. \$ 2,000,000
☒ AUTOMOBILE LIABILITY	☒ ANY AUTO OWNED AUTOS ONLY ☒ NON-OWNED AUTOS ONLY				COMBINED SINGLE LIMIT (per accident) \$ BODILY INJURY (per person) \$ BODILY INJURY (per accident) \$ PROPERTY DAMAGE (per accident) \$
☒ UMBRELLA LIAB.	☒ EXCESS LIAB. ☒ CLAIMS MADE				EACH OCCURRENCE \$ AGGREGATE \$
☒ WORKERS COMPENSATION	☒ DED. ☒ RETENTION \$				PER. ☒ LTD. ☒

Certificate of Liability Insurance PDF preview showing all policy and contact details, with a completion notification visible.

Review the certificate PDF to confirm the **Waiver of Subrogation** box is checked as required, and that all policy limits display accurately:

- Commercial General Liability: \$1,000,000 each occurrence, \$2,000,000 general aggregate, \$100,000 damage to rented premises, \$5,000 med exp, \$1,000,000 personal & adv injury, \$2,000,000 products-comp/op agg.
- Workers Compensation: \$1,000,000 each accident, \$1,000,000 disease-policy limit, \$1,000,000 disease-each employee.

Also confirm the correct policy numbers and effective/expiration dates appear (for example, Policy #1234, 6/26/2020–6/26/2021), and that the **Additional Insured** and **Subrogation Waived** boxes are marked as needed.

ac54e43f-1de0-4ea6-84 X +

file:///C:/ASI/ASI.TAM/ThinClient/Temp/ac54e43f-1de0-4ea6-845f-c4b9aba9c0a0.pdf

1 of 1

Fit to page Page view Read aloud Add notes

ACORD REDBGAR-01 KATHY1A1S
CERTIFICATE OF LIABILITY INSURANCE DATE (MM/DD/YYYY) 2/10/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsements.

PRODUCER ASNOA CONTRACT Joseph Kobel
PHONE (630) 468-1701 FAX (630) 468-1701
E-MAIL jkobel@ais-ins.com
INSURER(S) AFFORDING COVERAGE NAIC #
INSURER A Lloyds of London 065202
INSURER B Badger Mutual Insurance 13420
INSURER C:
INSURER E:
INSURER F:

INSURED Redbud Gardens Test Client
999 Main Street
Burr Ridge, IL 60527

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

TYPE OF INSURANCE	ADDITIONAL INSURED (IND. NO.)	POLICY NUMBER	POLICY EFF. (MM/DD/YYYY)	POLICY EXP. (MM/DD/YYYY)	LIMITS
☒ COMMERCIAL GENERAL LIABILITY					
☐ CLAIMS-MADE ☒ OCCUR	X	1234	6/26/2020	6/26/2021	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (per occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPROP AGG \$ 2,000,000
SEVERE AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PER ☐ LOC					
OTHER					
AUTOMOBILE LIABILITY					COMBINED SINGLE LIMIT \$ ANY AUTO OWNED ☐ SCHEDULED ☐ BODILY INJURY (per person) \$

Certificate PDF showing waiver of subrogation, policy limits, and all required wording.

24. Finalize certificate issuance

Click **Finish** in the Issue Certificate dialog to complete the process. If a **Validation Error** dialog appears stating "Required information is missing," click **OK**, then review the fields highlighted in red to identify and fill in any missing required information, such as missing email addresses or contact details.

ACORD **REDBGAR-01** **KATHYIAIS**
DATE (MMDDYYYY) 2/10/2020

CERTIFICATE OF LIABILITY INSURANCE

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER: ASNOA
CONTACT: Joseph Kobel
FAX: (630) 468-1701
E-MAIL: Kobel@ais-ins.com
INSURER A: Lloyds of London
INSURER B: Badger Mutual Insurance
INSURER C: Badger Mutual Insurance
INSURER D:
INSURER E:
INSURER F:

INSURED: Redbud Gardens Test Client
999 Main Street
Burr Ridge, IL 60527

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

TYPE OF INSURANCE	ADD. TAINT	POLICY NUMBER	POLICY EFF. DATE (MMDDYYYY)	POLICY EXP. DATE (MMDDYYYY)	LIMITS
☒ COMMERCIAL GENERAL LIABILITY	☒ CLAIMS MADE ☒ OCCUR	1234	6/26/2020	6/26/2021	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (EA occurrence) \$ 100,000 MED EXP (any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 COMBINED SINGLE LIMIT (EA acobem) \$ BODILY INJURY (per person) \$

GEN'L AGGREGATE LIMIT APPLIES PER
☒ POLICY ☐ LOC ☐ OTHER

AUTOMOBILE LIABILITY
☐ ANY AUTO ☐ SCHEDULED

Validation Error dialog over the Issue Certificate window, with required fields highlighted in red.

Log activity and verify attachments

25. Complete activity logging

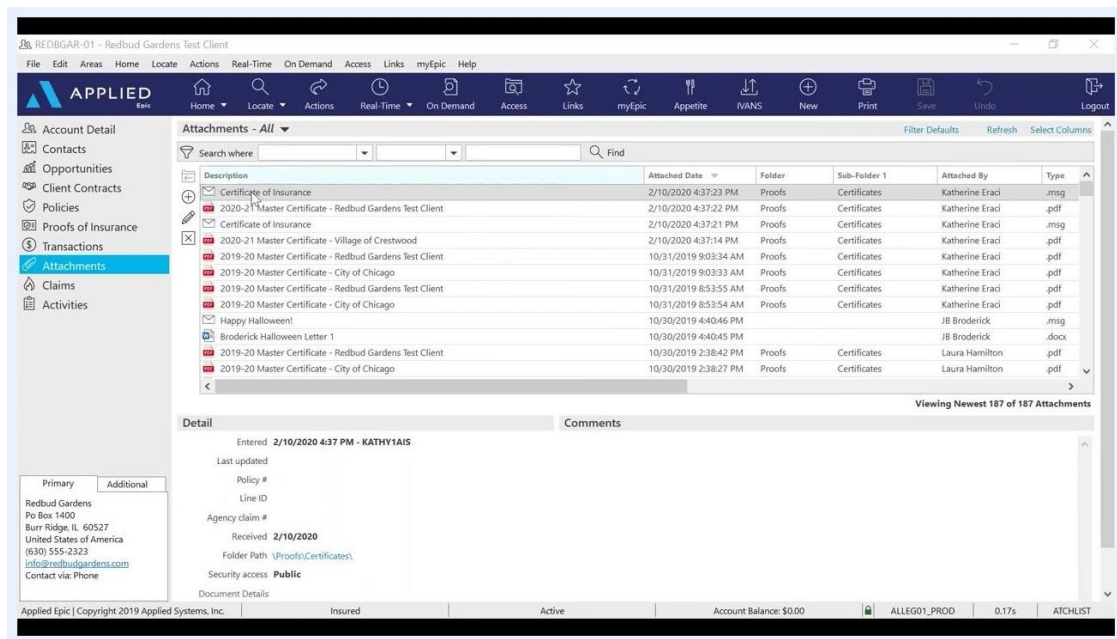
After issuing the certificate, an **Add an Activity** dialog appears. Enter a description for the activity, such as "Issued certificate for Redbud Gardens Test Client." Set the status to **Closed** and the reason to **Successful**, and confirm the follow-up/start date and contact details are correct. Click **Finish** to log the activity.

The screenshot shows the 'Issue Certificate' dialog in the Applied Epic system. The dialog is titled 'Issue Certificate' and has tabs for 'Organization Contact', 'Holder Distribution', and 'Holder Distribution'. The 'Organization Contact' tab is active. It shows the contact name 'Joseph Kobel' and the license number 'ASNOA'. The 'Holder Distribution' section shows a list of holders: 'Redbud Gardens Test Client' and 'Village of Crestwood'. The 'Delivery Options' section shows the contact 'Redbud Gardens' and the delivery method 'Email'. The 'Email/Fax Details' section shows the email address 'keraci-bova@asnoa.net' and the subject 'Certificate of Insurance'. The message body contains the text 'Hello, Please find attached Certificate as requested.' The dialog has buttons for 'Preview', 'Finish', and 'Cancel'.

Add an Activity dialog with description, status, and contact details filled in.

26. Verify the certificate attachment in the client file

Navigate to the **Attachments** section for the client in Applied Epic. Confirm that the issued certificate and related email are attached and listed with the correct date, folder, and type (for example, .pdf, .msg). Review the details at the bottom of the screen to ensure the attachment is accessible and properly categorized.



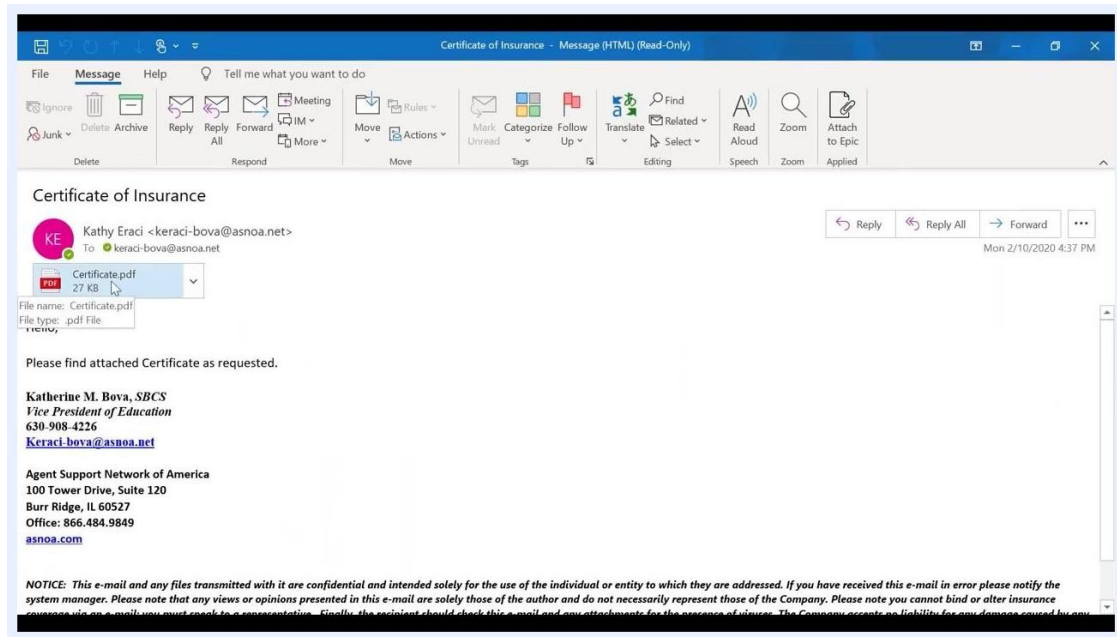
Attachments section showing the Certificate of Insurance and related files attached to the client record.

27. Review the sent email in Outlook

Open the sent email in Outlook to verify:

- The subject line (for example, "Certificate of Insurance")
- The recipient email address (for example, keraci-bova@asnoa.net)
- The attached certificate PDF (for example, Certificate.pdf, 27 KB)
- The message body (for example, "Hello, Please find attached Certificate as requested.")
- The sender's signature and agency contact information

Confirm the email matches the intended content and includes the correct attachment.



Outlook email showing subject, recipient, attached certificate PDF, message, and signature.

Summary

By following these steps, you can create a certificate of insurance in Applied Epic from start to finish: building a master certificate with default templates, adding additional policies, setting up certificate holders with the correct distribution details, issuing the certificate, and confirming it is logged and attached to the client record. Completing each step ensures every holder receives accurate coverage information and that your communications and documentation are properly verified in both Applied Epic and Outlook.