

Certificate of Insurance Requests

Risk and Safety



How to Request a Certificate of Insurance

Did you know that you can request a Certificate of Insurance (COI) from ADP TotalSource®? This self-serve feature eliminates the need for calls or emails to the Risk team and helps to speed up the process!

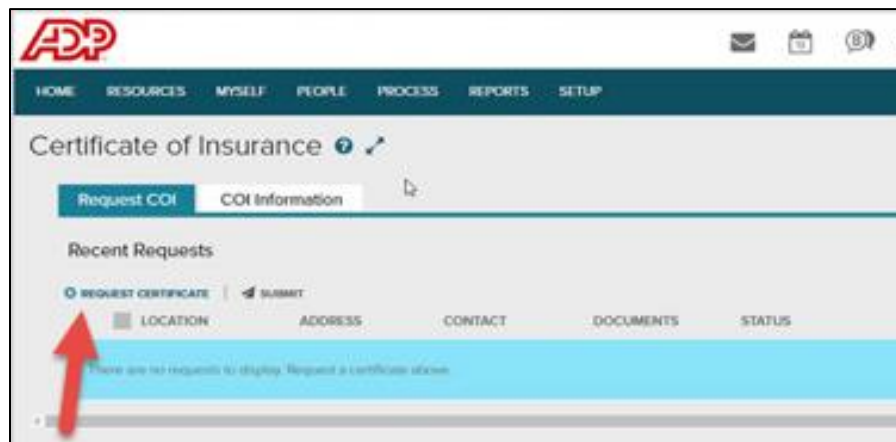
In addition to making a request, this handy COI tool allows you to add or edit addresses that are associated with the account.

To access the COI feature in ADP TotalSource, follow the instructions below:

1. Navigate to **RESOURCES > Risk > Certificate of Insurance**.



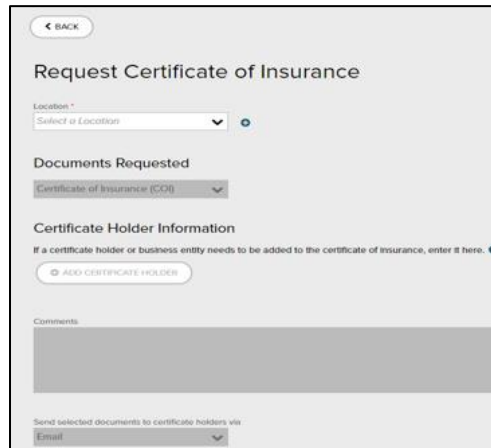
2. The **Request COI** tab is where most tasks are performed. From here, you can request a COI or a Declaration Page. To initiate a COI request, click **REQUEST CERTIFICATE**.



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- From the **Request Certificate of Insurance** window, select the **Location** from the available list. The Location information will prepopulate based on the locations and addresses we have on record.

Note: Users can add a new Location by clicking the + (plus icon) or edit a Location by clicking **Edit**. (See **Add or Make Edits to a Location** for additional information.)



Request Certificate of Insurance

Location *
Selected a Location

Documents Requested
Certificate of Insurance (COI)

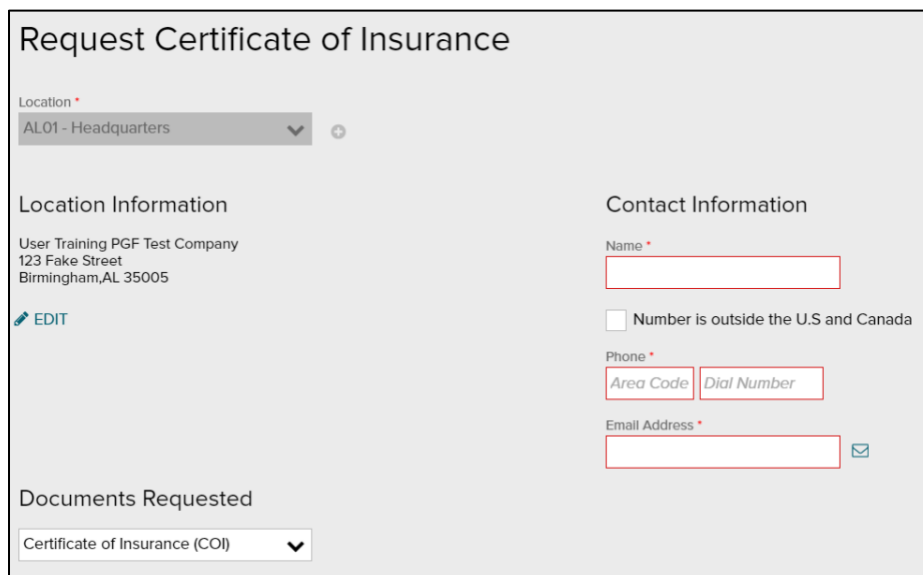
Certificate Holder Information
If a certificate holder or business entity needs to be added to the certificate of insurance, enter it here.

+ ADD CERTIFICATE HOLDER

Comments

Send selected documents to certificate holders via
Email

- Enter your **Contact Information** and, under **Documents Requested**, select **Certificate of Insurance (COI)** or **Declaration Page**.



Request Certificate of Insurance

Location *
AL01 - Headquarters

Location Information
User Training PGF Test Company
123 Fake Street
Birmingham,AL 35005
EDIT

Contact Information
Name *

Number is outside the U.S and Canada

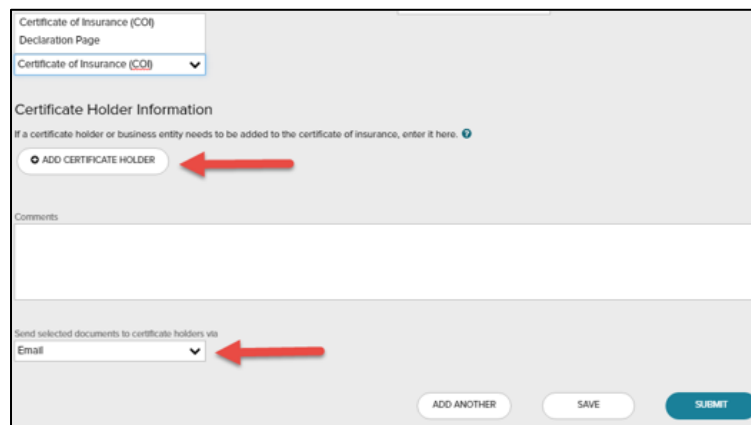
Phone *
Area Code Dial Number

Email Address *

Documents Requested
Certificate of Insurance (COI)

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5. Enter the **Certificate Holder Information** and **Comments**, if necessary. The Certificate Holder is the third party or other entity that is requesting a copy of the COI. You can add multiple Certificate Holders by clicking ADD ANOTHER.



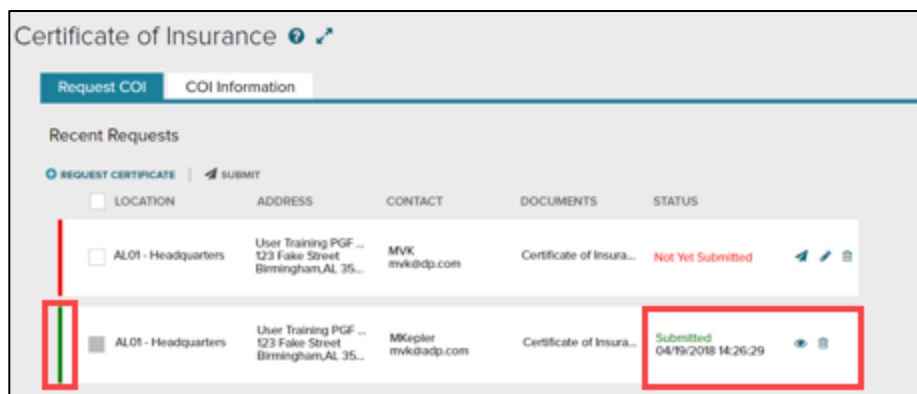
6. Select a method for delivering the COI (mail or email) and then click either:
 - **ADD ANOTHER** to add another COI request,
 - **SAVE** to save your changes, or
 - **SUBMIT** to submit the request.

Note: You must click **SUBMIT** after entering each request.

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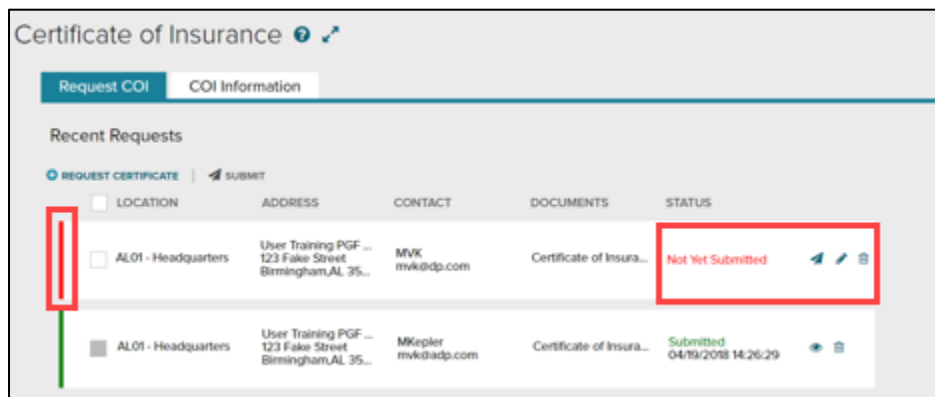
Submitted Requests

- Once you've submitted a request, you'll see a confirmation message that asks you to allow 24 hours for processing.
- Next to your submitted requests, you will see a green bar and a status of **Submitted** with the submission date and time. The request is then submitted via email to AON. See **E-mail to AON** for more information.
- AON will send the COI via mail or email, depending on the delivery method you selected in the request.



Saved Requests

Requests that have been saved but have not been submitted will appear in the request list with a red bar and a status of **Not Yet Submitted**.



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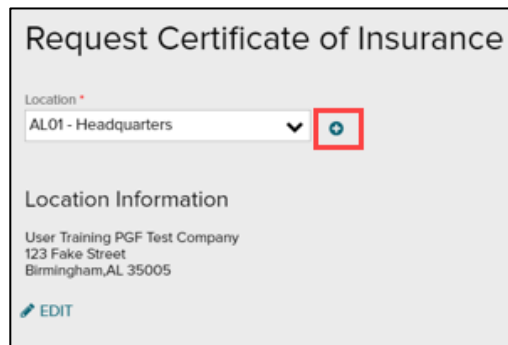
Add or Make Edits to a Location

The self-serve COI feature also allows you to add or edit locations, so that you can easily keep your information up-to-date.

Add a New Location

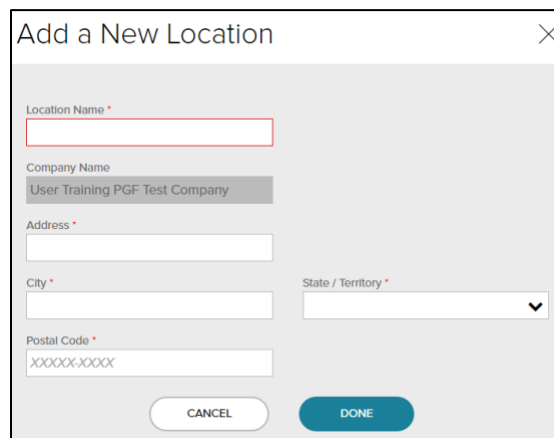
To add a new location to your account record, follow the instructions below:

1. Click the + (plus) icon next to the **Location** field.



The screenshot shows a form titled "Request Certificate of Insurance". At the top, there is a "Location" dropdown menu with "AL01 - Headquarters" selected. A red square highlights a plus icon (+) to the right of the dropdown. Below the dropdown is a section titled "Location Information" containing the text: "User Training PGF Test Company", "123 Fake Street", "Birmingham, AL 35005". At the bottom left of this section is a blue pencil icon followed by the word "EDIT".

2. In the **Add a New Location** window, complete all of the required fields and click **DONE** to submit the request.



The screenshot shows a modal window titled "Add a New Location" with a close button (X) in the top right corner. The form contains the following fields: "Location Name" (a red-outlined text input), "Company Name" (a greyed-out text input with "User Training PGF Test Company" displayed), "Address" (a text input), "City" (a text input), "State / Territory" (a dropdown menu), and "Postal Code" (a text input with "XXXXXX-XXXX" as a placeholder). At the bottom are two buttons: "CANCEL" and "DONE".

Note: New locations are not automatically stored in the COI feature. The added Location is only available while in the request where it was added. Once you navigate away from the request or submit the request, the New Location will *not* appear in the Location list.

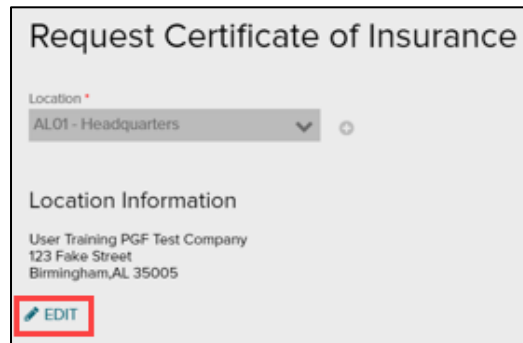
When you add a new Location in the COI feature, one of your Service Team members will receive a notice and add the Location to your account record for you. Once it has been officially added by a Service Team member, it will be available for all future COI requests.

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Edit a Location

To edit a location, follow the instructions below:

1. Click the **EDIT** icon below **Location Information**.



The screenshot shows a form titled "Request Certificate of Insurance". Under the "Location Information" section, the address is listed as "User Training PGF Test Company, 123 Fake Street, Birmingham, AL 35005". A red box highlights a blue pencil icon and the word "EDIT" below the address.

2. Enter the corrected address information.

This process is similar to the process for adding a new Location! When you update or edit a Location, one of your Service Team members will receive a notice and edit the Location on your account record so that it's available for all future COI requests.

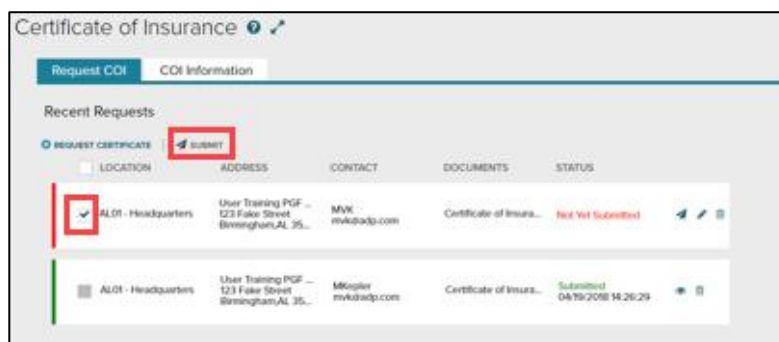
Actions Available from the Request COI Page

The following actions can be performed from the **Request COI** page.

If a request is labeled **Not Yet Submitted**, you can:

- Edit the request (pencil icon),
- Delete the request (trash can icon), or
- Submit the request (arrow icon).

You can submit multiple saved requests by checking the small box to the left of the request(s) and clicking the **SUBMIT** button.

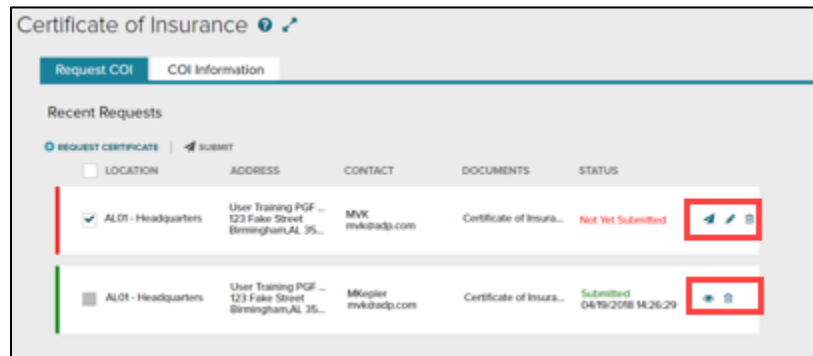


The screenshot shows the "Request COI" page with a "SUBMIT" button highlighted in red. Below the button is a table of recent requests:

LOCATION	ADDRESS	CONTACT	DOCUMENTS	STATUS
<input checked="" type="checkbox"/> AL01 - Headquarters	User Training PGF - 123 Fake Street Birmingham, AL 35...	MVK - mvk@adp.com	Certificate of Insura...	Not Yet Submitted
<input type="checkbox"/> AL01 - Headquarters	User Training PGF - 123 Fake Street Birmingham, AL 35...	Mikopler mvk@adp.com	Certificate of Insura...	Submitted 04/19/2018 14:26:29

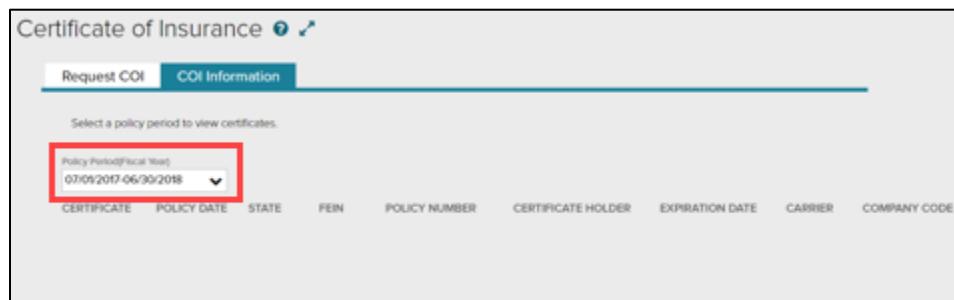
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- If a request is labeled **Submitted**, you can:
 - View the request (eye icon), or
 - Delete the request (trash can icon).



Actions Available from the COI Information Page

You can also access previous certificates from the **COI Information** page. Just select a Policy Period from the drop down, and you'll see a list of all COIs requested for that policy year.



That's it! Now that you've learned all about the system's self-serve COI tool, you can easily request a Certificate of Insurance, and add or edit locations!

As always, please don't hesitate to contact your Risk & Safety Consultant if you have any questions.