

eIdyia Solutions, inc.

Insurance Certificate Program

(Producers Version)

How to... and where...

Q: How do I Login?

A: See page 1

Q: How do I add a new Insurance Company?

A: Instructions on pages 2 and 3

Q: How do I edit an Insurance Company's Details?

A: See page 4

Q: How do I add a new Insured to the database?

A: Instructions on pages 5 and 6

Q: How do I edit an Insured's Details?

A: See page 7

Q: How do I create a Liability Certificate?

A: Instructions on pages 8 and 9

Q: How do I add or view a Holder to a Certificate?

A: See page 9

Q: How do I edit a Liability Certificate?

A: See page 10

Q: How do I create and edit a Property Certificate?

A: See page 11

Q: How do I add or view Property Interests?

A: See page 12

Q: How do add a Vehicle Identification Card?

A: See page 13

Q: How do I view, edit or print the VIC's?

A: See pages 14 and 15

Q: Are there any enhanced features?

A: Yes, See the Enhanced Features Section beginning on page 17

Step One: Producer Login

Once you've been included in the Producers Certificate Program. You will receive an e-mail containing your user ID/password and a link to your producer's home page. It should be similar to the one below. You may want to add this page to your favorites for ease of access later.

Certificate Program

Producer Login

Enter your ID and password below.

Producer ID:

Password:

Login

Enter your provided Producer ID and Password then click the "Login" button.

Note: Once you have provided us with a copy of your logo. It will appear on all of the pages within your database.

Step Two: Input your Insurance Companies

Once you have “Logged In” you will see a dialog box similar to the one below.

Certificate Program
[Insured Certificates](#) | [Insurance Companies](#) | [Logout](#)

Insured Certificates

Insured Name:

Just below the Certificate Program title, there are three blue text links. Please click on [Insurance Companies](#). This will take you to a dialog box similar to the one below.

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Insurance Companies

Insurance Company Name:

To add a new Insurance Company to the database click the “New” button.

Step Two: Continued....

This will take you to a dialog box similar to the one below.

Certificate Program
[Insured Certificates](#) | [Insurance Companies](#) | [Logout](#)

Insurance Company Detail

Company Name:	<input type="text"/>
Address:	<input type="text"/> <input type="text"/>
City:	<input type="text"/>
State: <input type="text"/>	Zip Code: <input type="text"/>
Phone: <input type="text"/>	Fax: <input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Here you can add an Insurance company's data one by one. After entering the company's data click the "Save" button. This will return you to the Insurance Companies dialog box.

Certificate Program
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Insurance Companies

Insurance Company Name:

To view or edit a company's information, enter the company's name and click on the "Search" button. This will show you a page similar to the one at the top of the next page.

Step Two: Continued....

Certificate Program

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Insurance Companies

Insurance Company Name:

Click on Company Name to edit information.

Company Name	Address	City	State	Zip	Phone	Fax
Any Insurance Company	Any Street	Any Town	AS	123456	800-888-8888	800-888-8889

To edit a company's information click on the company's name. The company's name is highlighted in blue and on the left. This will take you to that company's contact info dialog box similar to the one below.

Certificate Program

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Insurance Company Detail

Company Name:	<input type="text" value="Any Insurance Company"/>	
Address:	<input type="text" value="Any Street"/>	
City:	<input type="text" value="Any Town"/>	
State:	<input type="text" value="AS"/>	Zip Code: <input type="text" value="123456"/>
Phone:	<input type="text" value="800-888-8888"/>	Fax: <input type="text" value="800-888-8888"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

Here you can view and make changes to the company's contact information. Remember to click the "Save" button to save any changes you have made.

Step Three: Input Insured's Information

From the title menu choose the blue link [Insured Certificates](#). To add a new Insured click the "New" button.

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Insured Certificates

Insured Name:

This will take you to the add Insured's Detail box similar to the one below.

Certificate Program
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Insured Detail

Insured Name:	<input type="text"/>
Address:	<input type="text"/> <input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/> Zip Code: <input type="text"/>
Phone:	<input type="text"/> Fax: <input type="text"/>
Login ID:	<input type="text"/>
Password:	<input type="text"/>
Enabled:	<input type="checkbox"/>
Signature:	----- Select Signature ----- <input type="button" value="v"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Here you will need to input the Insured's contact information. The login ID will be automatically generated after you save the Insured's details.

Login ID:	9
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Step Three: Continued....

You the Producer must choose the password for your insured.

Password:	<input type="text"/>
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The enable check box is your control button for the Insured.

Enabled:	<input checked="" type="checkbox"/>
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Meaning: You check this box and their certificates are online. Uncheck it if the premium has not been paid and they'll no longer have access to their certificates.

As a producer you will need to furnish copies of the signature or signatures for your certificates to the Administrator of the Certificate program. Then they will be available to select from the "Select Signature's" drop down box. At which time you can choose the signature that fits the Insured's certificate.

Signature:	<input type="text" value="----- Select Signature -----"/> <input type="button" value="v"/>
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After you have entered the appropriate information click the save button. You will then be returned to the beginning, where you can add more Insured's information. Or view and edit the one's that you have already entered.

Certificate Program

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Insurance Companies

Insurance Company Name:

To view or edit an Insured's information click on the blue link [Insurance Companies](#), then enter the Company's name and click on the "Search" button.

Step Three: Continued....

This will take you to a page that looks similar to the one below.

Certificate Program
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Insured Certificates

Insured Name:

Click on Insured Name to edit information and certificates.

Insured Name	Address	City	State	Zip	Phone	Fax
Any Insured	Any Street	Any Town	AS	123456	888-888-9999	800-888-9998

To view or edit this Insured's account, click on the Insured's name. It will be highlighted in blue on the far left. This will take you to the Insured's Detail box, similar to the one below.

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Insured Detail

Insured Name:	<input type="text" value="Any Insured"/>
Address:	<input type="text" value="Any Street"/> <input type="text"/>
City:	<input type="text" value="Any Town"/>
State:	<input type="text" value="AS"/> Zip Code: <input type="text" value="123456"/>
Phone:	<input type="text" value="888-888-9999"/> Fax: <input type="text" value="800-888-9999"/>
Login ID:	9
Password:	<input type="text" value="password"/>
Enabled:	<input checked="" type="checkbox"/>
Signature:	<input type="text" value="Select Signature"/> <input type="button" value="v"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Here you can view and edit the Insured's information including their certificates. Or you can add and view their holders as well as enable or disable their account.

Step Four: Creating a Liability Certificate for the Insured

After locating your insured via the “Search” button, click on their name highlighted in blue. Scroll down until you see the Liability Certificates control bar. It should look similar to the one below.

Liability Certificates Add						
		Issue Date	Description	Holders		
Edit	Copy	Any Day	Any Company	0	Holder List	Add Holder

Click on the “Add” button, this will take you to the certificate.

Certificate Program

[Insured Certificates](#) | [Insurance Companies](#) | [Logout](#)

Liability Certificate

Issue Date: Description:

Companies Affording Coverage	
Insurer A:	<input type="text"/>
Insurer B:	<input type="text"/>
Insurer C:	<input type="text"/>
Insurer D:	<input type="text"/>
Insurer E:	<input type="text"/>

Comp	Type of Insurance	Policy Number	Effective Date	Expiration Date	Limits
	General Liability <input type="checkbox"/> Comm. Gen. Liab. <input type="checkbox"/> Claims Made <input type="checkbox"/> Occur				General Aggregate: <input type="text"/> Products - Comp/Op Agg: <input type="text"/> Personal & Adv Injury: <input type="text"/>

Here you will enter the issue date of the certificate with a description of the certificate in the spaces provided. Then choose the Insurance Companies that will be providing the coverage for this Insured from the drop down boxes. The rest of the data will vary depending on the Insured.

Step Four: Continued....

Creating a new certificate continued....

▼	Worker's Compensation and Employer's Liability Prop/Partners/Officers Included Are <input type="checkbox"/> Included <input type="checkbox"/> Excluded				<input type="checkbox"/> WC Statutory Limits <input type="checkbox"/> Other EL Each Accident: <input type="text"/> EL Disease - Policy Limit: <input type="text"/> EL Disease - Ea Employee: <input type="text"/>
▼	Other <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>				<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Description of Operations/Locations/Vehicles/Special Items

After the pertinent data has been entered click the "Save" button. This will return you to the view and edit page for this Insured. If you need to enter the Holder Information for this certificate click on the [Add Holder](#) link to the far right.

Liability Certificates <input type="button" value="Add"/>						
		Issue Date	Description	Holders		
Edit	Copy	Any Day	Any Company	0	Holder List	Add Holder

Step Four: Continued....

Here you can add a holder to this certificate.

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Certificate Holder

Cert. Holder Name:	<input type="text"/>
Address:	<input type="text"/> <input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/> Zip Code: <input type="text"/>
Phone:	<input type="text"/> Fax: <input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

After entering the Holder information click the “Save” button. This will return you to the view and edit page of this Insured. There you can view the holder list by clicking on the words [Holder List](#), next to the add holder text.

Liability Certificates <input type="button" value="Add"/>						
		Issue Date	Description	Holders		
Edit	Copy	Any Day	Any Company	0	Holder List	Add Holder

You will see a page similar to the image below.

Certificate Program
[Insured Certificates](#) | [Insurance Companies](#) | [Logout](#)

Holder List

[Click here to add a new Holder.](#)

No certificate holders found.

If you wish to edit this certificate click on the “[Edit](#)” link to the far left highlighted in blue. This will return you to the original certificate file where you can view or edit the Insured’s Certificates.

Step Five: Creating a Property Certificate for the Insured

After locating you're insured via the "Search" button. Click on their name highlighted in blue and scroll down until you see the Property Certificate control box. It should look similar to the one below.

Evidence of Property Insurance <input type="button" value="Add"/>						
		Issue Date	Description	Interests		
Edit	Copy	Any Day	Any Insured	0	Interest List	Add Interest

To create a new Property Certificate click on the "Add" button, you should see a page that looks similar to the one below.

Certificate Program

[Insured Certificates](#) | [Insurance Companies](#) | [Logout](#)

Evidence of Property Insurance

Issue Date: Description:

Company Affording Coverage:

Loan Number	Policy Number	Effective Date	Expiration Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Continued until terminated if checked:			<input type="checkbox"/>
This replaces prior evidence dated:			<input type="text"/>

Property Information (Location / Description)

Remarks

After entering the pertinent data click the "Save" button. To edit the Property Certificate click on the "Edit" link highlighted in blue, on the left of its control bar.

To add an interest to the Property Certificate, click on the text **Add Interest**. It will be highlighted in blue, on the right of the Evidence of Property Insurance control bar similar to the one below.

Evidence of Property Insurance <input type="button" value="Add"/>						
		Issue Date	Description	Interests		
Edit	Copy	Any Day	Any Insured	0	Interest List	Add Interest

This will take you to a page similar to the one below.

Certificate Program

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Additional Interest

Additional Interest Name:	<input type="text"/>
Address:	<input type="text"/> <input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/> Zip Code: <input type="text"/>
Phone:	<input type="text"/> Fax: <input type="text"/>
Mortgagee:	<input type="checkbox"/>
Loss Payee:	<input type="checkbox"/>
Additional Insured:	<input type="checkbox"/>
Loan #:	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Here enter the pertinent data and click the “Save” button. This will return you to the Insured’s original file where you can view or edit the Insured’s Certificates. Clicking the “Cancel” button will just return you to the view and edit page of this Insured.

Step Six: Vehicle Identification Cards

On the original view and edit page of the Insured, scroll down to the Vehicle Identification Card control box. It should be similar the one below.

Vehicle Identification Cards								
Add	Print List	Print All	Mass Update					
			Eff Date	Exp Date	Year, Make & Model	VIN	Company	Policy #
Edit	Print	Delete	7-7-1999	7-7-2000	1995 FORD EXPLORER	BD99T676F7798	Gieco	785458

Click on the “Add” button. In a pop up window you will see similar card to the one below.

INSURANCE IDENTIFICATION CARD

STATE ISSUE DATE

COMPANY

POLICY NUMBER EFFECTIVE DATE EXPIRATION DATE

YEAR MAKE MODEL VEHICLE IDENTIFICATION NUMBER

AGENCY / COMPANY
 Any Company
 Any Street
 Any Town, AS 123456

INSURED
 Any Insured
 Any Street
 Any Town, AS 123456

Enter the pertinent data and click the “Save” button.

Note: The Agency/Company and Insured areas will be filled in with your current data. To edit or view this card again click on the [Edit](#) link highlighted in blue on the left of the Vehicle Identification Card control bar. This will open up the same box so you can update the card’s data. To do mass updates see the “Enhanced Features” Section.

Step Six: Continued....

Note: You will find all the Insurance Companies you have entered into your database in a pop up menu similar to the one below.

INSURANCE IDENTIFICATION CARD			
American Guarantee & Liability Insurance Co. Any Insurance Company Farmers <input checked="" type="checkbox"/> Geico Mid Century		ISSUE DATE 7-7-1999	
		EXPIRATION DATE 7-7-2000	
YEAR MAKE	MODEL	VEHICLE IDENTIFICATION NUMBER	
1995 FORD	EXPLORER		
AGENCY / COMPANY Any Insurance Company Any Street Any Town, As 123456			
INSURED Any Insured Any Street Any Town, AS 123456			
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Print"/>			

If you wish to print the list of cardholders, click the "Print List" button. This will open Adobe Acrobat and display a printable PDF of the list of cards stored in your database. It will look similar to the one below.



1/18/02		VEHICLE LIST		PAGE: 1	
YEAR	MAKE / MODEL	VIN	EFF. DATE	EXP. DATE	
1995	FORD EXPLORER		7-7-1999	7-7-2000	

If you choose to print all of the Vehicle Identification Cards, click the "Print All" button. A PDF will be generated for all of the actual cards.

Step Six: Continued....

Meaning: This is what a similar card will print like so load up that tray.

california (STATE)		INSURANCE IDENTIFICATION CARD ISSUE DATE: 7-7-1999	
COMPANY NUMBER	COMPANY Geico		
POLICY NUMBER 4674764	EFFECTIVE DATE 7-7-1999	EXPIRATION DATE 7-7-2000	
YEAR 1995	MAKE / MODEL FORD / EXPLORER	VEHICLE IDENTIFICATION NUMBER 12401974074707	
AGENCY / COMPANY Any Insurance Company Any Street Any Town, AS 123456			
INSURED Any Insured Any Street Any Town, AS 123456			

**THIS CARD MUST BE KEPT IN THE INSURED
VEHICLE AND PRESENTED UPON DEMAND**

IN CASE OF ACCIDENT: Report all accidents to your Agent/Company as soon as possible. Obtain the following information:

1. Name and address of each driver, passenger, and witness.
2. Name of Insurance Company and policy number for each vehicle involved.

NOTE: When you are done working on your database always remember to **LOG OUT**. The **Log Out** is on the right of the title bar, highlighted in blue. This will protect your data against hackers.

eIdyia Solutions, inc.

**Enhanced Features
Section**

How do I?

Q: How do I update a Liability Certificate annually?

A: See pages 18 and 19

Q: How do I copy a Liability Certificate?

A: See page 18

Q: How do I update a Property Certificate annually?

A: See pages 19 and 20

Q: How do I copy a Property Certificate?

A: See page 19

Q: How do I Mass Update the Vehicle Identification Cards?

A: See pages 20 and 21

Part One: Annual Updates for Liability Cert.

When you need to do annual updates on your Insured's Certificate you have two options. First: You can edit the existing certificate by just changing the effective dates and any other changes, then click the "Save" button.

Second: You can create a copy of the existing certificate and edit it's properties. Then rename the Certificate in the description box and click the "Save" button.

To do this you will need to locate the Insured in question via the "Search" button of the Insured's Certificates box, and click on their name highlighted in blue. Scroll down to the Liability Certificate control box. It should be similar to the one below.

Liability Certificates <input type="button" value="Add"/>					
		Issue Date	Description	Holders	
Edit	Copy	Any Day	Any Company	0	Holder List Add Holder

Here you need to click on the [Copy](#) link, highlighted in blue on the left. This will take you to a copy confirmation page similar to the one below.

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Copy Liability Certificate

Ready to copy Liability Certificate.

There are no holders for this certificate. Click the copy button to copy certificate.

Click on the "Copy" button and an exact copy of this certificate will be generated and saved to your database. Your certificate control bar will then look similar to the one below.

Liability Certificates <input type="button" value="Add"/>					
		Issue Date	Description	Holders	
Edit	Copy	Any Day	Any Company	0	Holder List Add Holder
Edit	Copy	Any Day	Any Company (Copy)	0	Holder List Add Holder

Part One: Continued....

Edit the pertinent data and click the “Save” button.

Note: Producers do not have permission to delete Certificates so you need to be sure before copying it. A Delete button may be added in the future but for now that’s how it is.

Part Two: Annual Updates for Property Certs.

The instructions for this are very similar to the Liability Cert. After locating your Insured’s view and edit page, scroll down to the Evidence of Property Certificate control box. It should be very similar to the one below.

Evidence of Property Insurance <input type="button" value="Add"/>						
		Issue Date	Description	Interests		
Edit	Copy	Any Day	Any Insured	0	Interest List	Add Interest

Click on the [Copy](#) link highlighted in blue on the left. You will be taken to a copy confirmation page similar to the one below.

Certificate Program

[Insured Certificates](#) | [Insurance Companies](#) | [Logout](#)

Copy Property Evidence Certificate

Ready to copy Evidence of Property Insurance Certificate.

There are no additional interests for this evidence certificate. Click the copy button to copy evidence certificate.

If you’re sure you want to copy this cert, click the “Copy” button and an exact copy of the cert will be generated and stored in your database. You can then edit the pertinent data and click the “Save” button. Your Evidence of Property Certificate control box should look similar to the one at the top of the next page.

Part Two: Continued....

Evidence of Property Insurance <input type="button" value="Add"/>						
		Issue Date	Description	Interests		
Edit	Copy	Any Day	Any Insured	0	Interest List	Add Interest
Edit	Copy	Any Day	Any Insured (Copy)	0	Interest List	Add Interest

Note: Remember to change the name of the (copy) certificate in the description box. This can be done by clicking on the [Edit](#) link on the left, highlighted in blue.

Part Three: Mass updating the Vehicle Identification Cards

All the VIC cards can be edited individually or with the "Mass Update" button. This button will open up a dialog box similar to the one below.

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Vehicle Certificate Mass Update

This allows you to update multiple Vehicle Identification Cards for:
Any Insured

Select the value you want to update from the Old Value column, and enter the new value in the New Value column. If you dont want to update a particular field, leave the Old Value column blank.

Field	Old Value	New Value
Effective Date:	<input type="text" value=""/>	<input type="text" value=""/>
Expiration Date:	<input type="text" value=""/>	<input type="text" value=""/>
Policy Number:	<input type="text" value=""/>	<input type="text" value=""/>
Company:	<input type="text" value=""/>	<input type="text" value=""/>

Part Three: Continued....

The mass update feature will only update a field of your choosing. Let's say you only want to update the effective and expiration dates on your VIC's. Then only those dates would be mass updated and the rest would remain unchanged. A change will only take place to the VIC cards that have the same Old Value to the New Value.

For example: If half of your cards renew every six months, then only those cards would be updated to the new dates. Not the other half that renews six months later.

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Vehicle Certificate Mass Update

This allows you to update multiple Vehicle Identification Cards for:
Any Insured

Select the value you want to update from the Old Value column, and enter the new value in the New Value column. If you dont want to update a particular field, leave the Old Value column blank.

Field	Old Value	New Value
Effective Date:	<input type="text"/>	<input type="text"/>
Expiration Date:	<input type="text"/>	<input type="text"/>
Policy Number:	<input type="text"/>	<input type="text"/>
Company:	<input type="text"/>	<input type="text"/>

Once you have entered the appropriate changes click on the "Update" button.

Note: Remember once you have completed any task within the database, you should always "Log Out". This will protect your data from hackers!!!