Instructions to Add Certificate Holders to CSR 24

- Go into CSR-24
- Click the arrow next to **SEARCH** to input Client Name or Client Code
- Click **FIND** to search accounts
- Select the appropriate Account
- Click **HOLDERS** in the menu on the left
- Click **ADD** on the top of the screen to add a single holder
- Input the appropriate information in the fields that appear
  - Under the Holder Information section:
    - Enter all contact information, including Holder Number, Loan Number and Group Code, if applicable
    - If the holder is assigned to a specific location, click **NONE** next to "Assigned Location" to select from a list of locations already entered under this account.
      - The option to use this Assigned Location in place of insured information on issued certificates appears. Select if requested.
  - Under the Nature of Interest section:
    - If the holder is a Mortgagee and/or Loss Payee, select the appropriate boxes. Add up to two other descriptions by clicking **SELECT** next to "Other Interest"
    - Date Interest Ends – if this Holder is no longer to be used after a certain date, indicate it in this field
    - Check off the three boxes if the holder is a Payor, if they require billing info, and/or if they require a policy
  - Under the Certificate Information Section:
    - Cert Holder and Renewal boxes should be selected by default. If not, select both.
    - Leave "Do they Require a Cert?" blank
    - Leave "Cancellation Days" blank
    - Leave Location/Description and Additional Description of Ops fields blank
  - Under the Certificate Templates Section:
    - Select all templates that might be used to issue a certificate for this holder
      - Press CTRL while clicking to select multiple certificates or press SHIFT to select a range of certificates
  - Under the Insured/Subrogation Waived Section:
    - Select **Yes** or **No** for each Line of Business listed. If a certificate (ACORD 25) is ever issued for this holder with the "Enable holder level AI or Subr WVD status" checked, these choices will be used.
  - Under the Delivery Information Section:
    - Input delivery information for up to three recipients. You can choose to fax the certificate, email the certificate, or both.
- Click **SAVE** at the top of the screen