

Instructions to Create New Certificate Templates

(revised 2/19/14)

- Go into CSR-24
 - URL: <https://www.i-csr.net/Voyager/Site.mvc/Authentication/Login>
 - Agency ID: Sterlingrisk, User ID: Your First Initial Last Name (ie: jdowd), Password: sterling
- Click the arrow next to **SEARCH** to input Client Name or Client Code
- Click **FIND** to search accounts
- Select the appropriate Account
- Click **PROOFS** in the menu on the left
 - Click **CERTIFICATE TEMPLATES** in the drop-down that appears
- Click **ADD** on the top of the screen
- Fill In:
 - Template Origination Date – Today's date
 - Template Expiration Date – The soonest date of expiring policies
 - Description for Agency's Use – The description of this template. Use the following format:
 - POLICY YEAR/COVERAGE TYPE/ENTITY/LOCATION(if needed)
Example: 13-14 EOP Watertown 12 Pearl St
13-14 GL UMB WC Watertown 20 Pearl St
 - Description to be Displayed – Description of the certificate to be seen by the insured
- Check the following boxes:
 - INCLUDE IN RENEWALS
 - ALLOW CLIENT ACCESS
 - INCLUDE PROP/NATURE OF INTEREST
- **NEVER** check CANCELLED
- Select **ACORD 25 (2014/01)** from the Form drop down menu
- Click **ADD** on the top of the screen
- Insured information should automatically appear
 - If it doesn't, please direct questions to the contact listed in CCD. Sometimes a different Insured Name and Address may be requested
- **NEVER** check "Enable holder level AI or Subr WVD status"
 - This will override the changes you make on the template with the selections associated with the Cert Holder that will be added later. Only check this if you want to use the AI/Subr WVD choices that are associated with a holder.
- **REVIEW** Producer, Insured, Contact, and Insurer information for accuracy
 - Under Producer, input request@sterlingrisk.com in the Email Address field
- In the COVERAGES section, check the applicable boxes and add policies and limits to match.
 - To Add Policy:
 - Click **ADD POLICY**

- Choose policy from Policy drop-down menu
- IF Policy number and information does not update automatically:
 - Input policy number
 - Choose letter from drop-down menu
 - Input Carrier
 - Alternatively, click the Question Mark next to the Carrier field to search Carriers
 - Input effective and expiration dates
 - Choose LOB from drop-down menu
 - Click **SAVE**
- Leave the Description of Operations/Locations/Vehicles field blank
 - If requested, click **LOOKUP** to find commonly used language
- Leave the Certificate Holder field blank
 - If requested, input Certificate Holder information or click **CHANGE** in order to choose from a list of existing Cert Holders
- Include “30 Days” in the Cancellation field
- Authorized Signature should always be David Sterling
- Click **SAVE** on the top of the page