

the SOLUTION

List of Features for eCertsONLINE.com

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www.eCertsOnline.com

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Another Value Added Product by

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OPERATIONAL CAPABILITIES

- **100% Browser Based**
eCertsONLINE is entirely browser based and accessed through the Internet.
- **Scalability**
Unlimited Insureds with unlimited Certificates with unlimited Holders and unlimited simultaneous Users.
- **Certificate Issuance**
Certificates of Liability Insurance (ACORD 25-S) can be issued by the sponsor or user. Certificates can automatically be sent to the sponsor, carrier(s), and certificate holder via e-mail, fax, U.S. Mail or Next Day Air or a combination of two i.e., e-mail and U.S. Mail. .
- **Forms Supported**
ACORD 24, 25, 27, 28 and Cancellation/Reinstatement Notices are included in eCertsONLINE.com. Certificates can be issued by the sponsor, retail agents, general agents, or insureds and are generated in a pdf format. In addition, custom forms may also be incorporated.
- **Training**
eCertsONLINE is simple to use and training is provided free of charge. In addition, there is an illustrated Admin manual and User's manual that may be accessed via the web site.
- **On-Line Manuals**
eCertsONLINE is simple to use and initial training is provided free of charge. In addition, there are illustrated manuals that may be accessed via the web site.

FEATURES

- **Multiple Sides**
eCertsONLINE consists of four separate sides: IT, Sponsor, Retail Agent Self-Service, and Insured Self-Service:
 - **IT**
Permits IT staff to set-up defaults, search for insureds/users across multiple offices, check delivery status, run reports, etc.
 - **Sponsor or Administrator**
This is the main side of eCertsONLINE. It allows sponsor staff to set-up accounts, issue certificates, approve issuance, run reports, etc.

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- **Retail Agent Self-Service**
Retail Agents with the proper authorization from a General Agent Sponsor can be permitted access to issue Certificates on behalf of their specific customers.
- **Insured Self-Service**
Insureds with the proper authorization from the Sponsor can be permitted access to edit holder information and issue Certificates.
- **Sponsor Approval Mode**
All self-served documents completed by the user may be previewed by the sponsor prior to actual issuance and either approved or rejected. Available on a customer-by-customer basis, the Approval Mode makes an ideal training aid for new users or to double check the content of the more complex certificates.
- **Attachments/Addendums**
Unlimited attachments can be added to a Certificate. In addition, unlimited addenda can be added to Holders.
- **Endorsements**
A library of over 50 standard ISO Eendorsements that can be allowed/disallowed for each certificate via a simple pull down menu. Carrier specific endorsements can be uploaded and prefill data from over 32 different fields, i.e., policy number, policy dates, insured and certificate holder names and addresses.
- **Reduced Limits**
Permits the GL and Excess limits to be reduced at the time of certificate issuance. Use of this feature is strictly controlled by the Sponsor.
- **Multiple Named Insureds**
For larger insureds with multiple entities and locations. This allows the individual entities name and address to be shown as the Insured at the time of issuance. This eliminates the necessity of each entity having a separate master template. The entity is selected for each certificate via a simple pull down table.
- **Reports**
All data can be accessed via the browser and sorted by many fields. Reports such as Insureds, Holders, Certificates and Usage logs can be generated with a few clicks of the mouse and also exported into Excel.
- **Renewals**
Renewal process allows the sponsor to bulk issue certificates with a few clicks of the mouse. Various filters allow "one-time only" certificates to be excluded and endorsements to be replaced. All certificates are automatically sent to the sponsor, carrier(s), holders, and any other designated party (optional) as one delivery, i.e., e-mail, fax, U.S. Mail, or CD, etc..

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- **Re-Instatement/Cancellation Notices**
With a few clicks of the mouse the sponsor can send a notice of cancellation or re-instatement to all certificate holders for an insured.
- **Auto-Archiving**
Automatically stores Certificates, Attachments, Endorsements, and Addenda in EXACT format at time of issuance. Completed documents can be retrieved and printed years into the future. This makes eCertsONLINE a truly paperless process.
- **Certificate Request**
Ability to upload the actual certificate request received from the insured. The request is then appended to the archived copy of the issued certificate.

CUSTOMIZATION

- **Signature**
Digitized signature(s) of the sponsor's authorized representative(s) appear on each issued certificate.
- **Links**
eCertsONLINE is automatically linked back to the sponsor's web site when the user exits. The sponsor's web site can be linked to eCertsONLINE - all free of charge.
- **Branding**
eCertsONLINE is automatically branded with the sponsor's logo, name, phone, "tag line", and license number on every screen in addition to custom colorization to match the sponsor's web site.

SECURITY

- **Passwords**
Sponsor and user's personnel are granted access through changeable passwords and User IDs. Up to four levels of security with different features are provided .
- **Backup**
Multiple backups are automatically performed daily.
- **Data Center**
eCertsONLINE is hosted at a tier 1 facility with redundant hardware, back-up generators, and 24x7 security guards. Your data won't be seen by anyone unless access is granted by you.

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SYSTEM DESIGN

- **SQL Server**
eCertsONLINE uses SQL Server 2000 technology for secure data access and unequalled processing power.
- **System Requirements**
eCertsONLINE was developed to be accessed by anyone anywhere via the Internet. The web site uses ASP technology and therefore requires 5.0 browsers and above (Internet Explorer recommended).
- **PDF Format**
All forms created by eCertsONLINE are in Adobe Acrobat's PDF format and Adobe Acrobat Reader must be installed to view or print. Adobe Acrobat Reader is free and may be downloaded from their web site.
- **Data Import**
Most certificate data from management systems can be uploaded into eCertsONLINE easily and free of charge.