

NETCERT USER GUIDE

JANUARY 2019

Functional Super User guide to navigating and using the NetCert application

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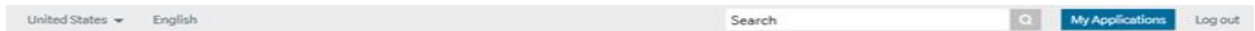
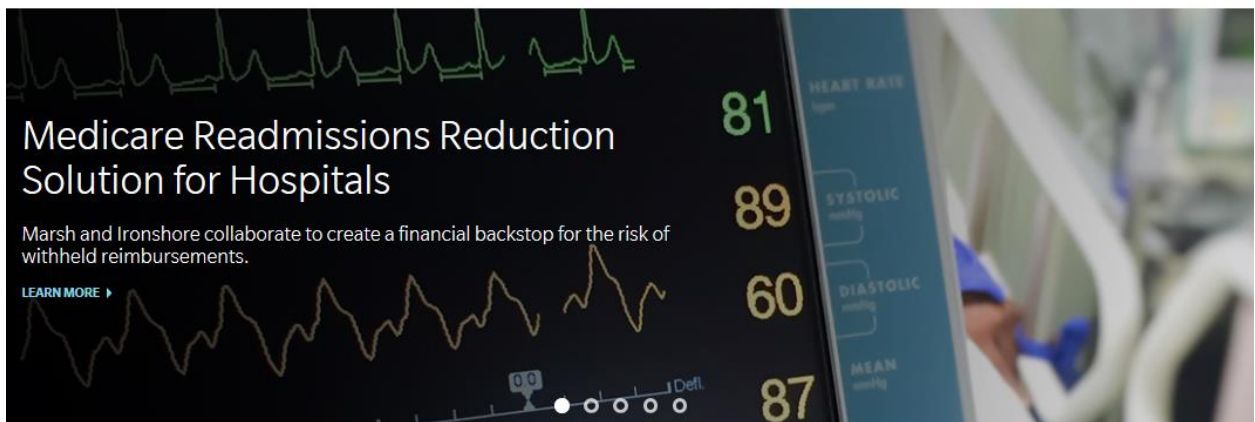
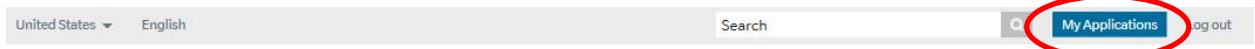
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Accessing NetCert

- Navigate to the Marsh Portal by logging on to the Marsh.com Home page. From “My Applications”, you should be able to directly access the NetCert application to produce certificates.
- - *NetCert is currently compatible with Internet Explorer 11 & Firefox browsers*



Welcome to the Marsh Portal

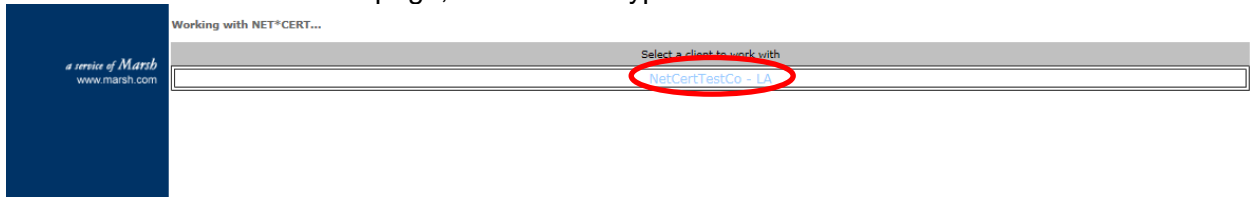
We hope you enjoy the new marsh.com. Clients participating in our pilot program will be able to access select applications below.

For all other clients, we plan to extend the scope of the Marsh Portal to include our major online applications and to roll this experience out globally. In the meantime, please continue to access your applications as you do today. Please click on the following link for access to [Marsh Cargo](#).

MY APPLICATIONS



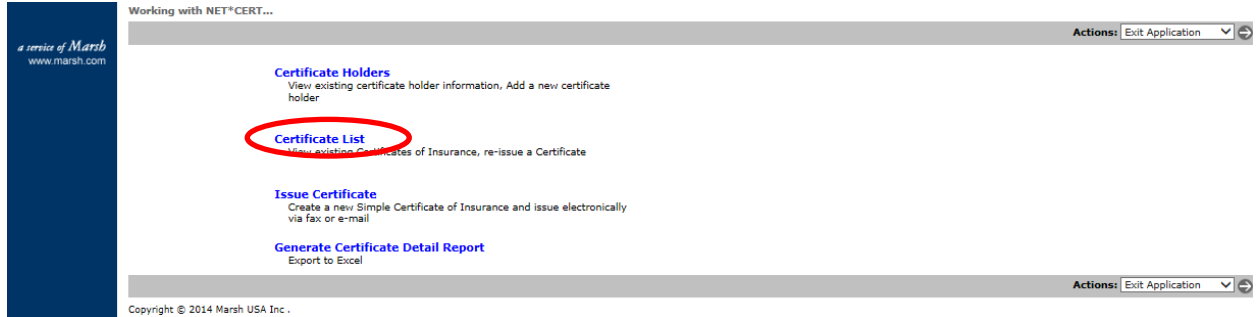
- Once user has clicked the NetCert button on the platform home screen, they will immediately be taken to the NetCert application link for that client to access certificates associated with that client.
- From the NetCert Home page, click on the hyperlink for the client name:



If you have trouble accessing Marsh.com, MarshConnect, NetCert, or have technical issues within any of the sites, please email myappsupport@marsh.com for assistance. A Marsh representative will respond to your request within one business day.

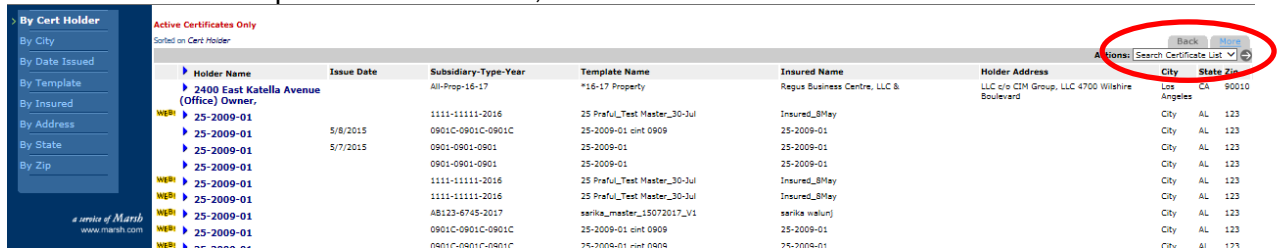
Search for Existing Certificate of Insurance

- From the Home screen Click “Certificate List”

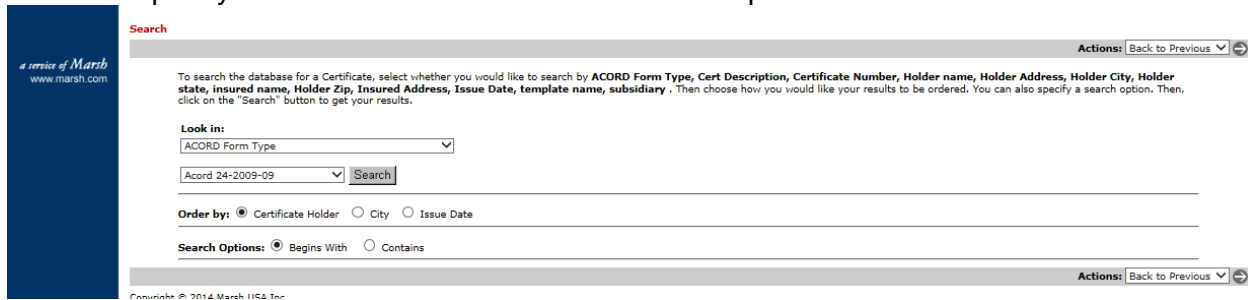


- To scroll through the list manually, use the “Back” and “More” navigation buttons on the right-hand side of the screen until you find the correct Holder

- To search for a specific Holder name, click on the arrow next to “Search Certificate List”:

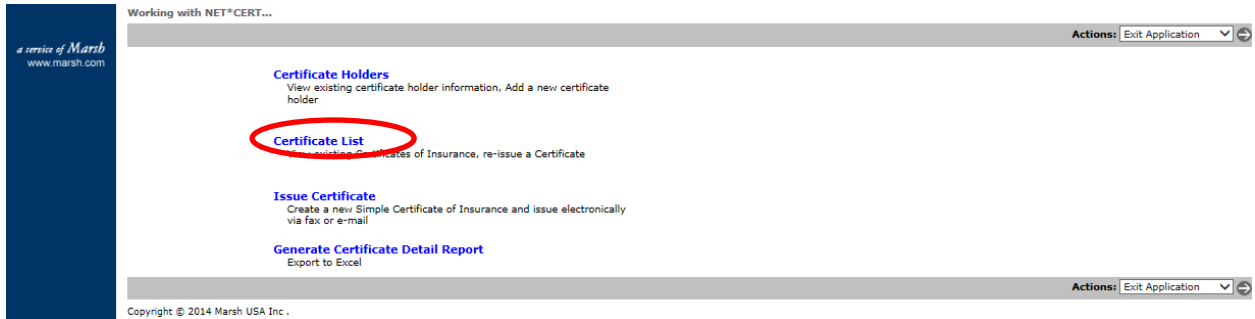


- From the “Search” screen, choose to search by various items from the “Look in:” menu. Type in your search criteria, and click the “Search” button. A list of certificates should come up on your screen based on the search criteria provided.



Re-issue an Existing Certificate of Insurance without Changes

- From the Home screen Click “Certificate List”

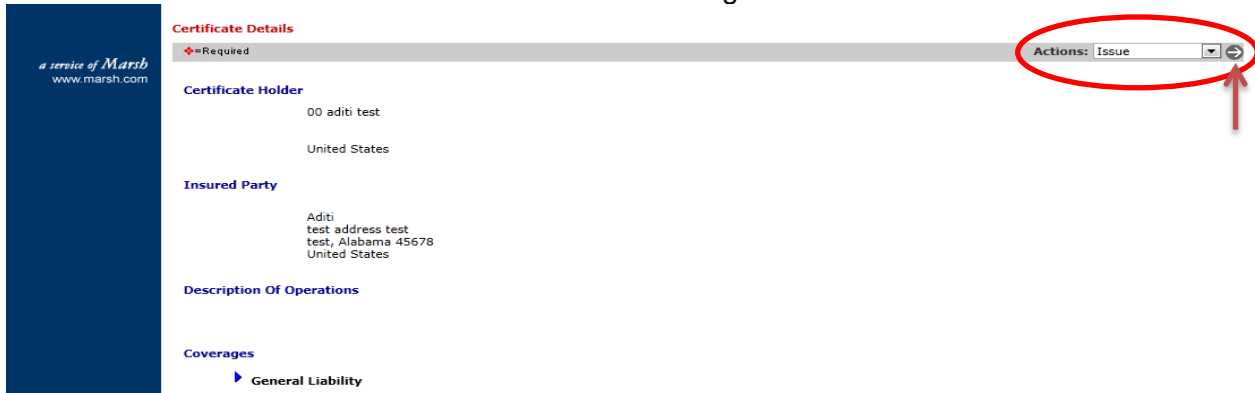


- From the Certificate List, search for the certificate you want to reissue and click the link for the Holder Name

Active Certificates Only
Sorted on Cert Holder

Holder Name	Issue Date	Subsidiary-Type-Year	Template Name	Insured Name	Holder Address	City	State	Zip
2400 East Katella Avenue (Office) Owner		All-Prop-16-17	*16-17 Property	Regus Business Centre, LLC B	LLC c/o CIM Group, LLC 4700 Wilshire Boulevard	Los Angeles	CA	90010
WERI 25-2009-01		1111-11111-2016	25 Praful_Test Master_30-Jul	Insured_8May		City	AL	123
WERI 25-2009-01	5/8/2015	0901C-0901C-0901C	25-2009-01 cimt 0909	25-2009-01		City	AL	123
WERI 25-2009-01	5/7/2015	0901-0901-0901	25-2009-01	25-2009-01		City	AL	123
WERI 25-2009-01		0901-0901-0901	25-2009-01	25-2009-01		City	AL	123
WERI 25-2009-01		1111-11111-2016	25 Praful_Test Master_30-Jul	Insured_8May		City	AL	123
WERI 25-2009-01		1111-11111-2016	25 Praful_Test Master_30-Jul	Insured_8May		City	AL	123
WERI 25-2009-01		AB123-6745-2017	sarika_master_15072017_V1	sarika walunj		City	AL	123
WERI 25-2009-01		0901C-0901C-0901C	25-2009-01 cimt 0909	25-2009-01		City	AL	123
WERI 25-2009-01		0901C-0901C-0901C	25-2009-01 cimt 0909	25-2009-01		City	AL	123

- Click the arrow next to “Issue” or “Preview” on the right-hand side of the screen:



- From the “Issue Certificate” screen, choose from preexisting recipients which are sourced from Marsh systems, or manually enter additional recipient(s) and click “Save & Issue”:

Issue Certificate

Required

Actions: Back to previous

Certificate Holder: 00 aditi test

The following recipients will receive a copy of the certificate

00 aditi test

Fax: 2129481838 Email: sasmit.chakraborty@marsh.com

Madhav

Fax: 201-284-5977 Email: madhav.bagwe@marsh.com

Additional Recipients :

Recipient Name	<input type="text"/>
Fax Number	<input type="text"/>
Email Address	<input type="text"/>
Recipient Name	<input type="text"/>
Fax Number	<input type="text"/>
Email Address	<input type="text"/>
Recipient Name	<input type="text"/>
Fax Number	<input type="text"/>
Email Address	<input type="text"/>

Cancel Save & Issue

- You will then see the confirmation screen. You can choose to download a pdf copy for your records:

Issue Certificate - Confirmation

Actions: Certificate List

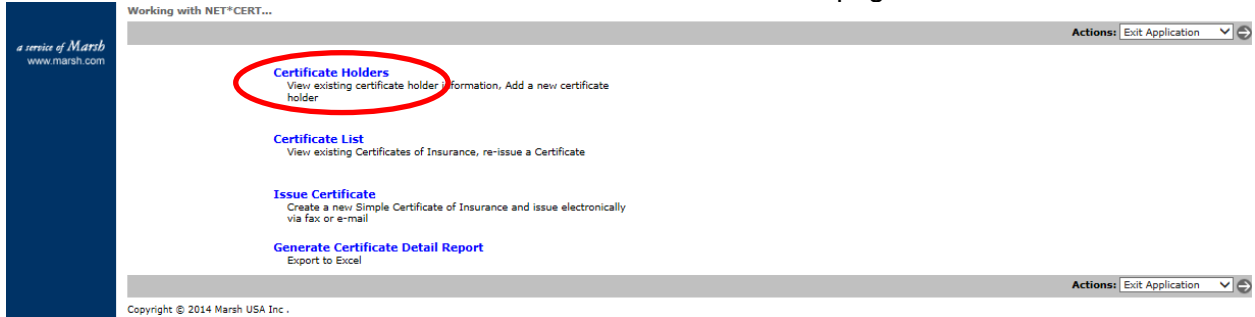
The requested certificate has been issued. To print a copy of the certificate, you may download a PDF version by clicking on the link below.

[Certificate : 05-003706408-09](#)

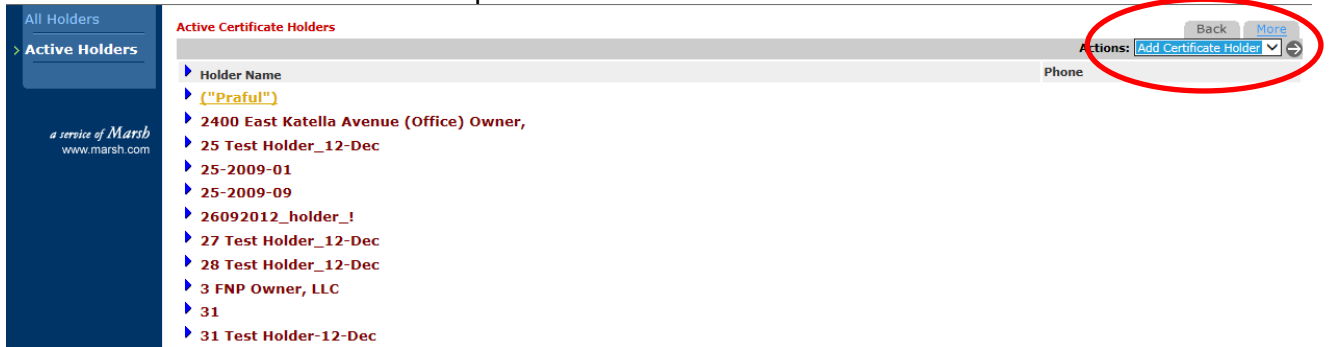
Actions: Certificate List

Add a New Certificate Holder

- Click on the link for “Certificate Holders” from NetCert home page:



- Select “Add Certificate Holder” from the Actions dropdown menu on the right-hand side of the screen. Click the arrow to proceed:



- Type in all required Holder information and click the Save button to proceed:

Add a Certificate Holder

Required

Actions: Back to Previous

Name Test - April 2016

Address

City State Please choose a state

Country United States Zip

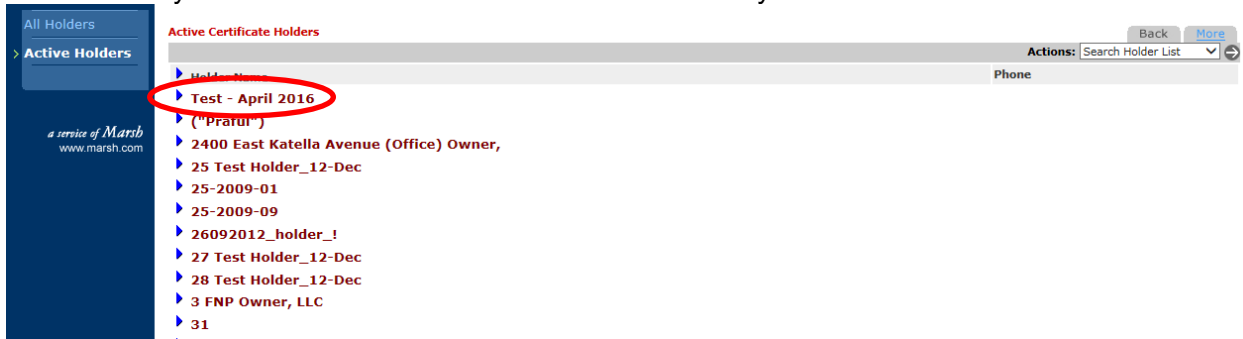
Phone Ext.

Fax

Email

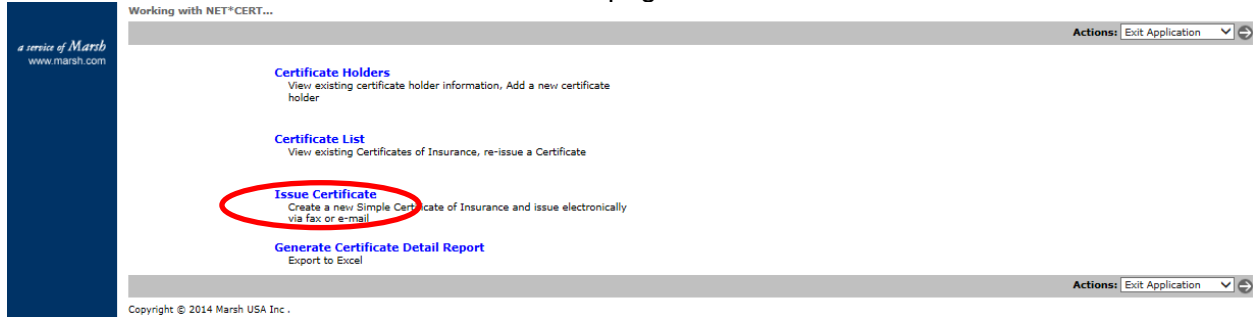
Cancel Save

- The newly created holder should show as the first entry of Active Certificate Holders:

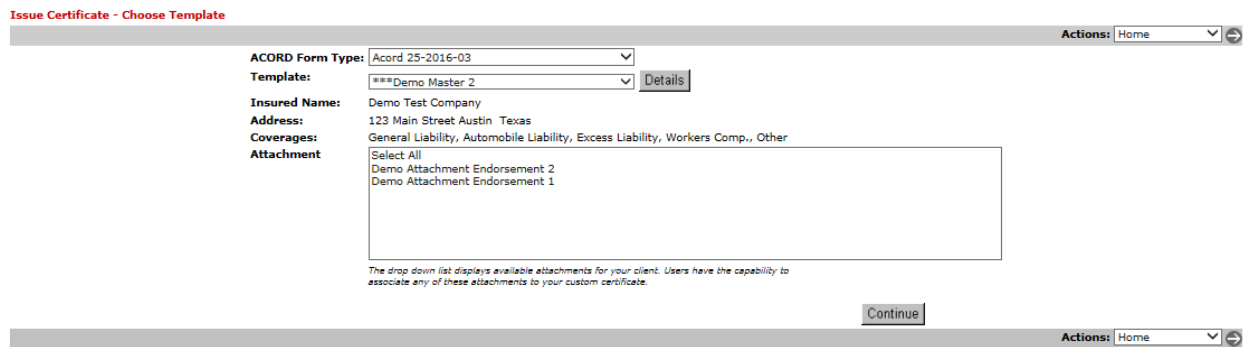


Create a New Certificate of Insurance

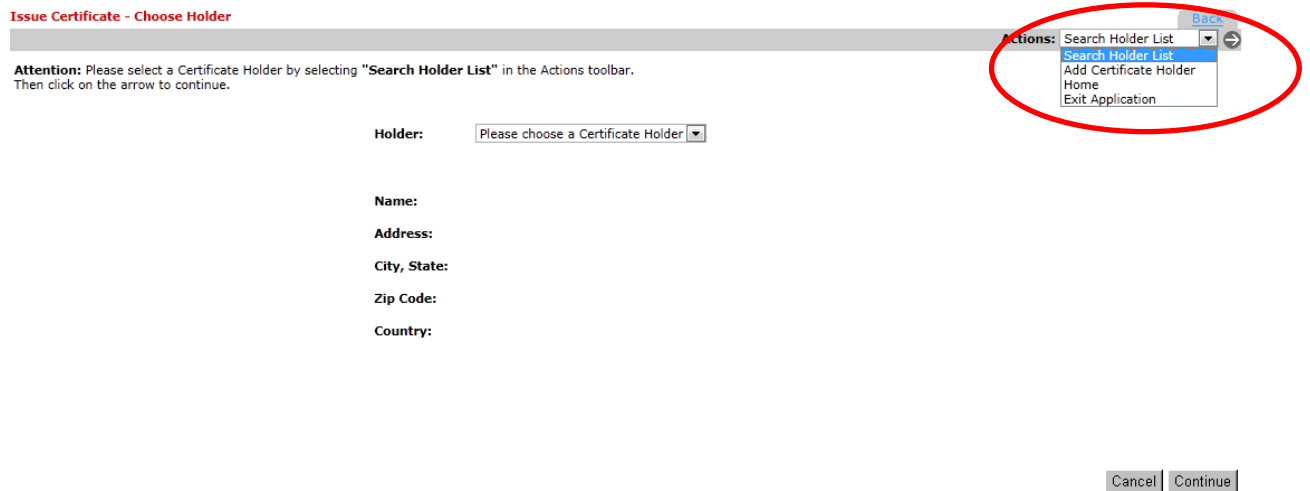
- Click on “Issue Certificate” from the Home page:



- From the “Issue Certificate – Choose Template” page, use the dropdown menu to pick an Acord form and template (if you have questions about which template to use, contact your Marsh service team). You may also select an Attachment/Endorsement if available and if needed. Click Continue:



- Select a Certificate Holder by selecting "Search Holder List" in the Actions toolbar. You can also “Add Certificate Holder” from this screen. Click on the arrow to continue:



- Search for a Certificate Holder. If you have just created a new Holder, you can search for it here as well:

Search

Actions: Back to Previous ▾ ↻

To search the database for a Certificate Holder, select whether you would like to search by **holder name, address or city**. Then choose how you would like your results to be ordered by. You can also specify the search option. Then click on "Search" button to get your results.

Look in : Holder Name Street Address City

Order by : Namer City

Search Options : Begins With Contains

Filter : Active Holders All Holders

- Select the correct Certificate Holder from the "Holder" dropdown menu and click the "Continue" button :

Issue Certificate - Choose Holder **Back**

Actions: Search Holder List ▾ ↻

Attention: Please select a Certificate Holder by selecting "Search Holder List" in the Actions toolbar. Then click on the arrow to continue.

Holder: ▾

Name: Test - April 2016

Address:

City, State:

Zip Code:

Country: United States

- To proceed with issuing the certificate using standard coverages and limits from the template, click "Preview Draft" to see a draft or "Save & Issue" to issue the final product. (If you want to issue a certificate using custom settings, please see section "[Create and Issue a Custom Certificate of Insurance](#)");

Issue Certificate - Verification **Back**

Actions: Preview Draft ▾ ↻

Template : NetCertTestCo- - -

Holder : Test - April 2016

Verify all information by clicking on the " **Preview Draft** " link. If you require a custom certificate, click on the " **CreateCustom** " link. If the information is correct, the certificate may be issued by clicking on the " **Save & Issue** " button

- Type in Recipient information, once done click “Save & Issue”:

Issue Certificate
◆ Required Actions: Back to previous ↩

Certificate Holder: Test - April 2016

The following recipients will receive a copy of the certificate

Additional Recipients :

Recipient Name	Marsh Test
Fax Number	
Email Address	test@marsh.com
Recipient Name	
Fax Number	
Email Address	
Recipient Name	
Fax Number	
Email Address	

Cancel Save & Issue

Create and Issue a Custom Certificate of Insurance

- To create and issue a custom COI, follow all instructions from the section “Create a New Certificate of Insurance” until you get to the “Insurance Certificate – Verification” screen. From this screen, choose “Create Custom” from the “Actions” dropdown menu or click the blue “CreateCustom” link:

Issue Certificate - Verification

Actions: Create Custom

Template : NetCertTestCo- - -

Holder : Test - April 2016

Verify all information by clicking on the "Preview Draft" link. If you require a custom certificate, click on the "CreateCustom" link. If the information is correct, the certificate may be issued by clicking on the "Save & Issue" button

Cancel Save & Issue

- You will be taken to section entitled “Issue Certificate - Create Custom Casualty Certificate”. From this section, you can choose which Coverages you wish to be shown, edit limits for Coverages, enter Contract Numbers or Project specific information, and any additional information in the Description of Operations:

Issue Certificate - Create Custom Casualty Certificate

Actions: Back to Previous

Certificate Holder

Test - April 2016
United States

Insured Override

NetCertTestCo

Address

NetCertTestCo
1133 Avenue of Americas New York NY 10036
United States

Coverages

General Liability Limits (Do not Print)

GENERAL AGGREGATE \$ 10,000

Excess Liability Limits (Do not Print)

EACH OCCURRENCE \$ 1,000,000
AGGREGATE \$ 1,000,000

Reset Limits to Original Values

Contract Number: Project/Location of Work:

Description Of Operations

Reset Description of Operations

Remarks

Important Notes

- All limits are set by the corresponding policy. As such, you cannot enter a value over the maximum policy limit.

- *Before entering any Additional Interests language such as Additional Insured Status for an entity, Waiver of Subrogation, etc. please make sure that the underlying coverages support that provision. Statements on a Certificate should only state what the underlying policy provisions support and should not be misleading a recipient. [See Appendix for list of additional prohibited words/phrases](#)*
- *If you have any questions about coverages, limits, Description of Operations, et al, please don't hesitate to reach out to a Marsh service team member.*

- Enter Recipients as required. Click “Save & Issue”:

Issue Certificate

Required

Actions: Back to previous

Certificate Holder: Test - April 2016

The following recipients will receive a copy of the certificate

Additional Recipients :

Recipient Name	<input type="text"/>
Fax Number	<input type="text"/>
Email Address	<input type="text"/>
Recipient Name	<input type="text"/>
Fax Number	<input type="text"/>
Email Address	<input type="text"/>
Recipient Name	<input type="text"/>
Fax Number	<input type="text"/>
Email Address	<input type="text"/>

Cancel Save & Issue

- You will be taken to a confirmation screen when complete:

Issue Certificate - Confirmation

Actions: Certificate List

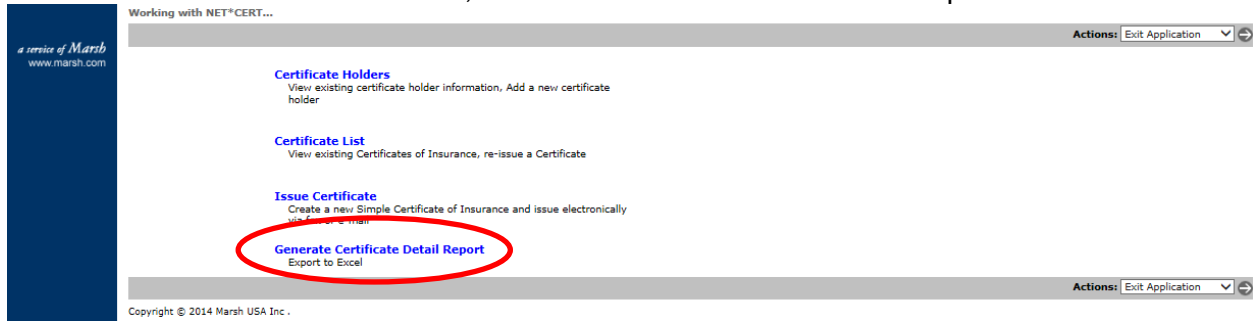
The requested certificate has been issued. To print a copy of the certificate, you may download a PDF version by clicking on the link below.

[Certificate : 05-005083360-01](#)

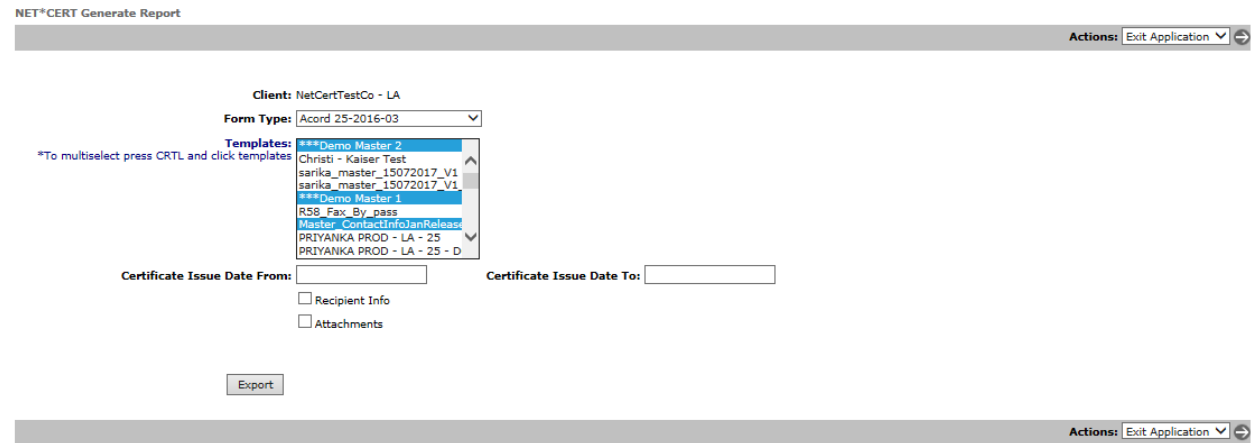
Appendix

Generating Certificate Reports

- From the NetCert Home screen, click “Generate Certificate Detail Report”



- Select a Form Type, Template (you can choose multiple templates by holding down Ctrl key while clicking with your mouse. You can also choose “Select All” under form type to generate a report for all certificates



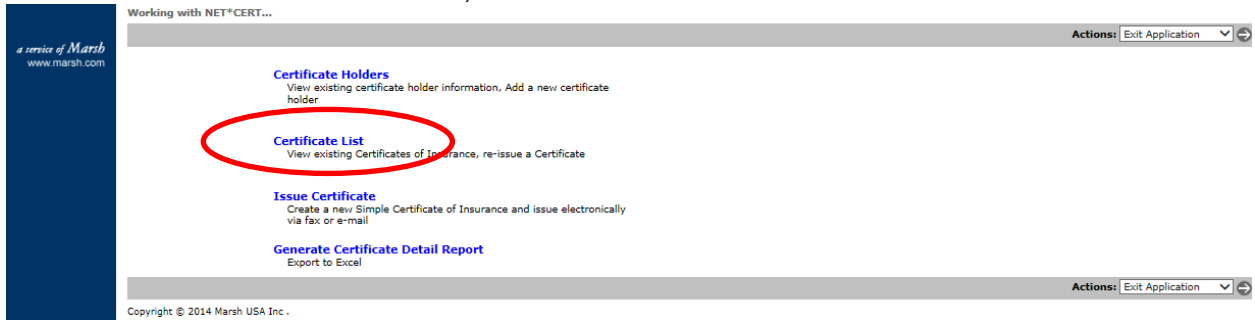
- Enter Date range or leave blank to export list of all active certificates. Click Export

Prohibited Words & Phrases

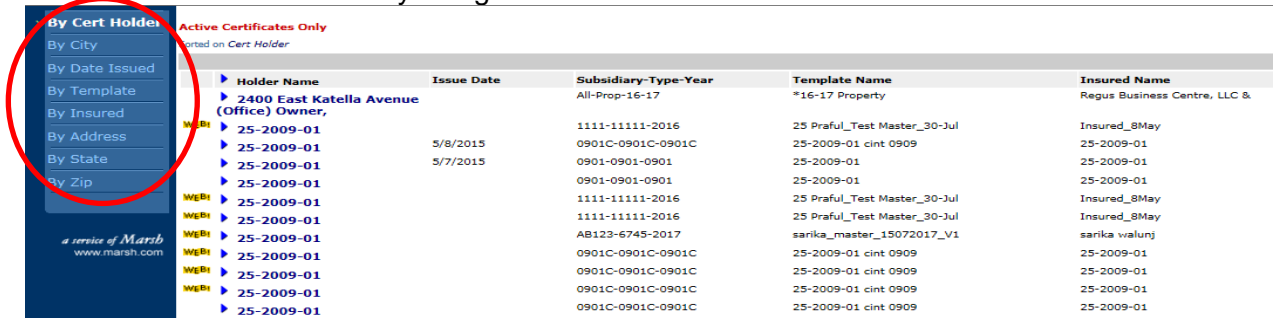
A.M. Best	Cuba	Harmless	Islamic Republic of Iran	policy number	Self Insured Retention
al-Qaeda	deductible	Hezbollah	Myanmar	rating	Sevastopol
Burma	Democratic People's Republic of Korea	Hizbollah	NOC	Republic of Cuba	SIR
cancel	exclusion	hold harmless	North Korea	Republic of the Sudan	Sudan
cancellation	exclusions	indemnify	notice of cancellation	Republic of the Union of Myanmar	Syria
Crimea	Hamas	Iran	Per the contract	Sebastopol	Syrian Arab Republic

How to Sort Certificates

- From the NetCert Home screen, click “Certificate List”



- You can choose to sort by using the links on the left-hand side of the screen



User Levels of Access

User Access Level	Issue Certificate	Preview Certificate	Create Custom Certificate	Download Issued PDF	View Certificate	Reissue Certificate (from Certificate List)	Download Reissued PDF	View Existing Holder	Add new Holder	Inactivate Holder	Report Generation
Administrator - A	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Power User - P	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	Y
User - U	Y	Y	N	Y	Y	Y	Y	Y	Y	N	Y
Read-Only User - R	N	N	N	N	Y	Y	Y	N	N	N	N