

# User Guide for Agents

## REGISTRATION:

New Agencies select **Agent Subscribe** or **Agent Sign Up** to access the **Registration** screen. Here you begin by selecting your own **User Name and Password** and provide your email address. When finished, click on the **Create Agent Account** button to move through the remainder of the 5 steps shown in the box at the top of the page.

- Step 1 - Set Up Your Account Access
- Step 2 - Fill In Your Agency Profile
- Step 3 - Click On E-Mailed Activation Link
- Step 4 - Log In And Enter Payment Info
- Step 5 - Add Certificates

User Name:  \* ?

Password:  ?

Confirm Password:  ?

E-mail:  ?

Confirm E-mail:



User Name:  \* ?

Password:  \*

Log in

Notice: To enhance security during the initial set up, **Step 3** requires that you go to your email account to click on the **E-mail Activation Verification** sent by EzCOI. The **Activation Link** email will bring you back to the **EzCOI Home page** and allow you to log in. This is where you'll log in to use EzCOI in the future.

After logging in your first time, you can complete your account info, select **Submit Card Information** then move on to the **Agent Control Center** screen shown below.



Card Type:

Card Number:

Card Expiration (MMYY):

CVV Code:

Submit Card Information

## Agent Control Center

[Manage Certificates](#) - Add Named Insured Accounts, Modify Existing Certificate Templates.

[Approve Certificates](#) - View, Modify & Approve Certificates of Insurance requested by your Insureds.

[Completed Certificates](#) - View Certificates of Insurance sent to your Insureds.

[Profile & Settings](#) - Make changes to your account preferences.

Select the **Manage Certificates** option to begin adding certificate templates for your Insureds to access, on their own, whenever they like, without having to call the Agency.

## CERTIFICATE MANAGEMENT:

Certificates are created on the **Manage Certificates** section of the **Agent Control Center**. Just select Add **New Certificate** and complete the Acord certificate form shown below. Once an initial certificate template is completed and saved, your new Insured will receive an email invitation enabling them to access EzCOI and their complete Certificate template anytime.

<b>Producer</b> EzCOI Test 1880 W. Judith Lane Boise, ID 83705				<b>Contact Name:</b> <input type="text"/> <b>Phone:</b> <input type="text"/> <b>Fax:</b> <input type="text"/> <b>E-Mail:</b> <input type="text"/>			
<b>Insured</b> <input type="text" value="ABC Paper Company"/> <input type="button" value="E"/> <input type="text" value="234 Main Street"/> <input type="text" value="Twin Falls, ID"/> <input type="text" value="83301"/>				<b>Insurers Affording Coverage</b>		<b>NAIC #</b>	
A: <input type="text"/>				A: <input type="text"/>		A: <input type="text"/>	
B: <input type="text"/>				B: <input type="text"/>		B: <input type="text"/>	
C: <input type="text"/>				C: <input type="text"/>		C: <input type="text"/>	
D: <input type="text"/>				D: <input type="text"/>		D: <input type="text"/>	
E: <input type="text"/>				E: <input type="text"/>		E: <input type="text"/>	
F: <input type="text"/>				F: <input type="text"/>		F: <input type="text"/>	

  

INSR LTR	Type of Insurance	ADDL INSR	SUBR WVD	Policy Number	Policy EFF	Policy EXP	Limits	
<input type="checkbox"/>	General Liability	<input type="checkbox"/>	<input type="checkbox"/>	9283238	12/2/2013	11/27/2014	Each Occurrence	\$1,000,000
<input type="checkbox"/>	<input type="checkbox"/> Commercial General Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Damage to Rented	\$ <input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> Claims-made <input type="checkbox"/> Occur	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Med Exp	\$ <input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Pers & ADV Injury	\$ <input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	General Aggregate	\$ <input type="text"/>
<input type="checkbox"/>	Genl Agg Limit Applies Per	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Prod-Comp/Op Agg	\$ <input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/> Policy <input type="checkbox"/> Proj <input type="checkbox"/> Loc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="checkbox"/>	Automobile Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Comb Single Lim	\$ <input type="text"/>

The **Manage Certificates** section is also where you will update existing Certificates at renewal.

The **Agent Control Center** also allows you to:

- Approve any certificates that contain **Additional Insured, Waiver of Subrogation** or any special language written into the **Description** section. You will be notified of these enhanced types of certs by email, and the COI will not be released without your approval.

Named Insured	Date Created	
<input type="text" value="ABC Paper Company"/>	<input type="text" value="12/5/2013 5:25:44 PM"/>	<a href="#">Review and Approve</a>

- Search for, view and edit completed Certificates that have been delivered.
- View and Edit the information on your Agent profile.

Once Insureds have access to their Certificate template, they can complete or request a Certificate any time they need one from their desktop or mobile device. All this is done without having to consume agency time processing certificates.