

User Guide for the Insured

As an Insured, you must be invited to join EzCOI by your Agent. If you don't have an EzCOI **Welcome E-mail** from your Agent, please contact your Agent and tell them you'd like to use EzCOI for direct access to your certificates.

Click on the link provided in the **Welcome E-mail** so you can choose a **User Name and Password** to access your account. (If you already have an account with EzCOI, and your Agent sends you a **Welcome E-mail**, the link will take you straight to the home page so you can log in).



Log into your EzCOI account with your **User Name and Password**.

User Name: *

Password: *

[?](#)

Log in

Control Center

[Create a Certificate](#) - Create a new Certificate of Insurance.

[Manage Certificates](#) - View your pending and previous Certificates of Insurance.

[Profile](#) - Edit your user profile and change your password.

Logging in will take you to the **Control Center** screen. Now Select **“Create a Certificate”**

Now choose “**New Certificate Holder**” for your first COI. Your Certificate Holders will be saved and displayed for you to access future renewal certificates fast and easy. (Your first experience with EzCOI will not have any Certificate Holders until you create them).

Agent Name	
Home Town Insurance Agency	New Certificate Holder
Certificate Holder	
D&B Contruction	Create Certificate
Fremont Property Management	Create Certificate

You are now on the **Enter Certificate Info** screen. Here, you type in the information as requested by your Certificate Holder. You can also specify special policy features (like **Additional Insured** or **Waiver of Subrogation**) and other special language in the **Description** section depending on your Certificate Holder’s needs.

Certificate Holder

D&B Contruction ✖

4126 E. Boulevard

Boise, ID 83709

Adding any of these special features or language to the COI may require review and approval by your Agent. If so, EzCOI will notify your Agent that the COI needs to be reviewed. We will also advise you that your Agent is reviewing it for you.

Description of Operations/Locations/Special Items

Certificate Holder Is Named As An Additional Insured

Includes Waiver of Subrogation In Favor of Certificate Holder

Insert Other Language Requested By Certificate Holder

Certificate Holder is named as Additional Insured.

Send a copy to the certificate holder.

[Continue to Preview/Create Certificate](#)

You can also request that a copy of your Certificate be emailed directly to your Certificate Holder, in addition to your own email. When your entries are complete, select the **Continue** button at the bottom of the page.

You are now on the **Review & Create Certificate** Screen where you review your Certificate prior to confirming your request. Confirm by selecting the **Create and Deliver Certificate** button at the bottom of the screen. If your COI request requires your Agent's review, you will receive the notification screen below. (Your Agent will either approve it so it can be sent to you via e-mail, or your Agent will contact you with further instruction depending on the special features and/or language you have requested on the COI).

INSR LTR	Type of Insurance	ADDL INSR	SUBR WVD	Policy Number	Policy EFF	Policy EXP	Limits
	General Liability <input type="checkbox"/> Commercial General Liability <input type="checkbox"/> Claims-made <input type="checkbox"/> Occur <input type="checkbox"/> <input type="checkbox"/> Genl Agg Limit Applies Per <input type="checkbox"/> Policy <input type="checkbox"/> Prod <input type="checkbox"/> Loc		X	asdfasdf	12/2/2013	11/27/2014	Each Occ \$1,000,000 Damage to Rented \$ Med Exp \$ Pers & ADV Injury \$ General Agg \$ Prod-Comp/Op Agg \$ \$
	Automobile Liability <input type="checkbox"/> Any Auto <input type="checkbox"/> All Owned <input type="checkbox"/> Scheduled <input type="checkbox"/> Hired <input type="checkbox"/> Non Owned <input type="checkbox"/>						Comb Single Limit \$ Bod Inj Per Pers \$ Bod Inj Per Acc \$ Property Damage \$ \$
	Umbrella Liab <input type="checkbox"/> Occur <input type="checkbox"/> Excess Liab <input type="checkbox"/> Claims Made <input type="checkbox"/> Ded <input type="checkbox"/> Ret\$						Each Occurrence \$ Aggregate \$ \$
	Workers Comp/Employer Liability Any Exclusions? (Y/N)	N/A					<input type="checkbox"/> Stat <input type="checkbox"/> Oth EL Ea Accident \$ EL Dis Ea Emp \$ EL Dis Policy Limit \$
Description of Operations							

If your COI request does not require your Agent's approval, you will receive this notification that your COI has been immediately delivered to your e-mail.
Easy. Fast. Done.

Congratulations!

Your certificate has been delivered via email to: ezcoitest2@gmail.com.

You may also view this certificate by selecting Manage Certificates from your Control Center.

[Continue](#)

You can also visit **Manage Certificates** on the **Control Center** screen in order to view your completed Certificates of Insurance on any computer, tablet, or smart phone anytime, anywhere. This is handy if you decide you want to send another copy of the COI to another party.