Dowd Online Policy Access

Working with Certificates Online

Being able to process your certificates online can be a huge help and time saver so you can spend less time handling your insurance and more time growing your business. We have put together this quick help manual for those using the online service to try and make your experience as smooth as possible.

Issuing a new Certificate of Insurance

This is the most common action performed on our online policy access section at www.dowd.com. It eliminates the need to send in a manual request and then wait for an account manager to be able to process that certificate and send it to you. Instead you can sign on, enter the holder information and get your certificate immediately. To issue a new certificate please follow the steps below:

1. Sign into Dowd's Online Policy access at www.dowd.com. Passwords are case sensitive so be careful when entering them in. If it does not sign you in and brings ups a new windows with some countries flags for language selection, then either your ID or password were entered incorrectly. You may click on the "forgot password" link or call your account manager for assistance.
2. While signed in, you will see your customer services menu with many different options. The one we will be working with in this manual is the Certificates. Click on the plus sign next to certificates to see all the menu items.

   ⊟ Certificates
     ▪ Click here to request certificate printing capability from your account manager.
     ▪ Request a Certificate of Insurance
     ▪ Issue a Certificate of Insurance
     ▪ Select Cert Holders For Renewal
     ▪ Add a certificate holder
     ▪ Edit a certificate holder
     ▪ Certificate Holder Spreadsheet

3. If you have not requested Certificate printing capability from your account manager you must first request this by phone or email. Without performing this step, you will not be able to continue. Just having access to dowd.com does not give you access for certificate printing. Your account manager has to receive your request, then enable your certificates for online access. They will notify you when you are able to process Certificates online.

4. Once you get the go ahead from your account manager to start issuing certificates, you can now use the **Issue a Certificate of insurance** link. When you click on the link, you see the following window appear:

Make sure that you have Certificate Templates checked and not Previously Issued Certificates for creating a new certificate. What you are looking at is all of the available certificate templates you can choose from. You may only have one option or you might have multiple template options such as one with additional insured or reduced limits. The red ones in the above example are expired and not usable. You will not usually see expired templates.

Just click once on the template you would like to use for your certificate. If you would like more certificate options or have any questions about them, please contact your account manager.

5. You should now be looking at your certificate on the screen with a blank holder section. Your two options are to either add a new holder, or use an existing holder. Look in the top left part of the screen for the option buttons:

To change the holder to a holder you have used before, click on the change cert holder button. To create a new holder click on the add cert holder button.

6. If you have clicked on the change cert holder, follow this step. (*If you selected Add Cert holder, skip to step 7.*) You will now be presented with all of the holders on your account. It only shows a few per page, so you can use the next and previous page buttons at the bottom, or type something in the search fields and hit the search button. Once you see the holder you would like to use, just click on the name.

Next, previous page   Search Button   Search fields

(Step 7 on next page)

7. After clicking add cert holder or selecting one from your list, you will see the cert holder screen appear. You have to fill out any fields marked with a star *. You cannot edit or add to the description of operations. If you need special wording added, you must choose the "Request a Certificate" menu item from the client services menu and not the issue a cert. Certificates with special wording must be requested then sent by our account managers.
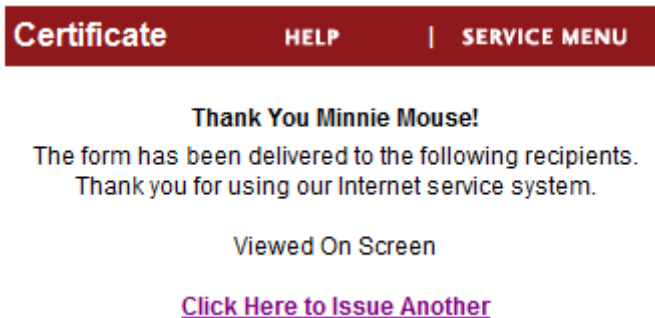

Some Tips for this screen:

- If you are issuing the cert for a job being performed, make sure you keep "Do they receive renewals" checked. This makes sure that if the job stays open during one of your

renewals, they will receive the renewal certificate automatically. If it is a one-time or one day event, you can click on the one time only box and they will not receive a renewal cert when it becomes available.

- Delivery Information – You should see your email address prefill here. If it is not your email address, change it and let your account manager know to change your email on your account. You should check the "Send me confirmation" box the first few times you process a certificate. This option will email you the certificate in case you have a pop-up blocker enabled. The view on screen option will show you the certificate immediately; however you MUST DISABLE POP-UP BLOCKERS for this site in order for this feature to work. If you have continued problems disabling popup blockers, please contact your IT support person or Jon Borges at Dowd Insurance.
- If you have the email address information of the holder, place that information into one of the recipient fields at the bottom. If you do this, it will immediately email the certificate to the holder with from our site. If you do not have their email information, you may leave these fields blank and you will still get a copy of the certificate that you can print, fax or email manually.

8. After filling out all information on the holder screen, click the submit request button at the bottom of the screen. You should now see two windows appear:

The first window will tell you that the Cert was successfully submitted and delivered to any recipients if they were filled in.

Certificate	HELP		SERVICE MENU

Thank You Minnie Mouse!
The form has been delivered to the following recipients.
Thank you for using our Internet service system.

Viewed On Screen

Click Here to Issue Another

The second window is your link to the certificate. Just click on the word Certificate to see a PDF that you can print, or email immediately. If you did not see this window, you have a popup blocker enabled. Please disable any popup blockers and try this again. A copy of the cert will also be delivered to your email if you selected "Send me confirmation"

Form and Attachment Links

Form: Certificate

Please note that Adobe Acrobat Reader Version 4.0 is required to view and/or print this form. If you do not presently have this reader installed on your computer, click the link below to download.

www.adobe.com/products/acrobat/readstep.html

How to Reprint a previously issued Certificate

This can be handy if you need something reprinted that was either lost, required again or maybe you had a popup blocker enabled when issuing your cert. Any cert created by Dowd employees the client (you) can be reprinted online.

1. Follow the same steps as issuing a certificate until you reach step 4. Here you want to click on previously issued certificates instead of Certificate templates.
2. Once you check the Previously Issued circle, you will be presented with a list of all of the certificates created online. You can use the same next, previous or search functions as shown in step 6 above.
3. Once you have clicked on the certificate you wish to re-print, just hit the submit button. The remaining pop-up windows are the same as when you issue a new certificate.