

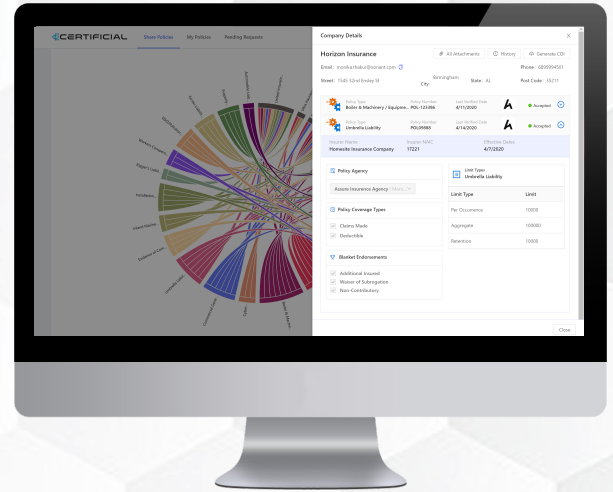


CERTIFICIAL

Dynamic Insurance Verification



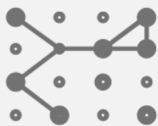
MARSH < > CERTIFICIAL QUICK REFERENCE GUIDE



WHAT IS CERTIFICIAL?

Certificial is an independent, data-driven platform that has improved and automated the insurance verification process by providing Organizations, their Suppliers, and Insurance Brokers the ability to dynamically share and monitor coverage information

Key Benefits



Reduce Complexity

Quickly and easily know the exact requirements each Requestor (Certificate Holder) is requiring for your Insureds.



Save Time & Money

By creating a direct connection to Requestors, you can now update a policy and automatically distribute that change to all Requestors of that Insured



Improve Transparency

Always be aware of your Insureds' coverage compared to Requestor requirements with real-time notifications of compliance issues



GET STARTED & ONBOARD TODAY

1

Register

Visit our [Registration Page](#) to create an Account and join an existing Broker.

2

Add Policies

Select the “Click for DIV Requests” button at the top of the screen to walk you through how to add policies and respond to a request.

3

Respond to Request

If not using the step-by-step walkthrough, select the “Open Requests” tab, locate the request and select the green check mark “Respond” icon

Digital Insurance Verification (DIV's)



What can we include in the Templates?

Brokers may receive a Digital Insurance Verification (DIV) Request from Certificial or a 3rd Party. The Notice will alert Brokers to: “Please be sure to register using this email address”. For security reasons all Clients and DIV requests are assigned to a single Broker email login. If the account should be managed by a different Broker or someone using a different email login – please login with the desired Account and select “Add Client” under the “Clients” tab. You can then enter the Insured’s Name, Email Address, or Request ID located in the initial request email and select “Transfer”. If you cannot locate the Request ID, please email us at support@certificial.com with the name of the Insured and Requestor.

Registration



Please register as a Broker at: <https://my.certificial.com/sign-up-agent/new>

Agency Name – Please select “Marsh USA Inc.”

Activation – The Agency Admin will need to approve your activation. This may take up to 24 hours. Please note the Agency Admin will be identified in the pop-up window that appears once you have completed registration.



Login & Navigation



Site URL:

my.certificial.com

“Clients” Tab: When you first login, you will see a roster of your Clients who Requestors have send requests for coverage for. Here you will add the policies for your Clients.

“Open Requests” Tab: Lists all requests awaiting your response. You can view the requests by Client and respond by selecting the blue checkmark icon. You must first add the Clients policies to respond. If your Client is not listed or a request you’re expecting to see if not there, it is likely assigned to another Broker. Please email us at support@certificial.com with the name of the Insured and the account will be reassigned.

Responding to the Request – Two Steps

PLEASE NOTE: The system will ask for a signature to be uploaded. A signature is not required to utilize Certificial. They are only required if you wish to use Certificial’s certificate issuance capabilities

1) Add Policies and Endorsements on “Client” tab

- While on the “Client” tab select the “+ Add New Policy” button. Select the policy type and enter the policy details as requested. Once you Submit & Close the policy will be added under your Client.
- You may add endorsement documents at the policy level by selecting the [blue cloud icon](#) next to the endorsement type.
- With all the policies and endorsements added for your Client, you may now respond to the open request.

2) Respond to Request

- Select the “Open Request” tab in the navigation at the top of the page.
- Select the Respond to Request button (the [green check mark](#) ✓ at the top right) to start the response process.
- **Policy Selection** – select from the policies you’ve added for your Client to satisfy the request. *Remember to add any umbrellas or excess, if needed, to meet requirements.* Please use the blue cloud icon to upload endorsement documents that apply specifically to this response.
- **Remarks** – displays the Requestor’s desired Description of Operations language – you may edit as you deem necessary.
- **Signature** – you may upload a signature or generate one using our signature creation utility. This is completely optional.
- **Cert Holder Info** – upload a completed COI on this page if you have not uploaded a signature.
- **Summary** – allows one last chance to see the policies you will be delivering to the cert holder and the COI attachment. It will also alert you if the policies fail to meet the cert holder’s requirements. However, compliant, or not, you may still Submit and send the data to the cert holder and complete the DIV response.