

Certificate of Insurance (COI) Request

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Certificate of Insurance (COI) Request Process

Use this process when a customer requests an updated COI.

1. Receive the customer's COI request.
2. Locate the customer's Master Agreement for reference.
3. Go to [EverHub - Home](#).
4. Navigate to Find-It and select Legal Request Form [located here](#).
5. Complete the required fields.
 - a. Solution Organization - select Bold
 - b. Legal Requests - select COI Request
 - c. Certificate Holder (Third Party Requesting COI) - enter Customer Name
 - d. Certificate Holder Address - Customer's address
 - e. Contact Email for Notice - Email address of the person requesting the COI
 - f. What insurance coverage type and amount is being requested? - type "General Coverage"
 - g. Underlying Agreement Included? - choose Yes and attache the Master contract below in attachments
 - h. Third Party Type - choose Customer
 - i. Enter the Subject as...
 - Complete subject
 - In Message, fill out and add supporting documents to include Master Contract and outdated COI, if provided
6. Attach the customer's Master Agreement and any other relevant supporting documentation.
7. Click Submit.
8. Legal's response and/or completed COI will be sent to you via email.

Helpful Notes

If the customer provides an old COI:

Save it and attach it to the Legal ticket. The previous certificate can help Legal identify the requested coverage and provides useful information such as the certificate holder's name and address.

If the customer does not provide an old COI:

You can indicate that **general coverage is needed**, unless the customer has requested specific coverage limits or endorsements in their email. If they have, make sure those requirements are included in the Legal request.
