



CERTIFICATE OF CURRENCY

How to Guide to printing templates and customised CoC's on Insurelink.

Call 1300 306 226 for Support

The following steps will guide you through the process of printing a customised Certificate of Currency (CoC) and provide a list of current templates available to you on Insurelink. These will help you provide documentation to meet your client's specific needs.

CERTIFICATE OF CURRENCIES

- Once a policy is 'Closed' and/or 'Accepted', a Policy Schedule and Certificate of Currency with all covers will auto-generate. You can access these through the Documents and Comments tab. N.B. You can also request these documents via your Broker Management System.

| Description | File Name | Date Added |
|-----------------------------|---|--------------------|
| Policy Schedule CBP | Policy Schedule CBP (GA800017190BU5P).pdf | 7/06/2018 11:57 am |
| Certificate Of Currency CBP | Certificate Of Currency CBP (GA800017190BU5P).pdf | 7/06/2018 11:57 am |

- You will also have access to a range of different Certificate of Currency templates in Insurelink and the ability to create a customised Certificate of Currency that can be selected and will auto-generate on request.
- Documents automatically generated or requested will remain stored in Insurelink for the duration of the policy and will be available in your Broker Management System.

GENERATING A CUSTOMISED COC

1. To generate a document, select:

REQUEST DOCUMENTS

2. The **Request Documents** page will provide you with a number of selections, including Policy Schedule and CoC's as shown below:

REQUEST DOCUMENTS

- Policy Schedule
- CoC - Full Policy
- CoC - Liability(Non PO)
- CoC - Liability(PO)
- CoC - Liability (Non PO) & Liability(PO)
- CoC - Liability (Non PO) & Glass
- CoC - Liability(PO) & Glass
- CoC - Liability(Non PO), Liability(PO) & Glass
- Confirmation of Answers

Cancel Submit

3. To generate a customised CoC, click on the **'CoC – Full Policy'** option, then click **'Select sections'** or **'Select interested party'**.

REQUEST DOCUMENTS

- Policy Schedule
- CoC - Full Policy
 - Select sections
 - Select interested party

4. All details relating to the policy will appear, providing you with the option to select which sections / situations / interested parties that you require for your clients CoC.

CoC - Full Policy

- Select sections
- Select interested party

Sections

| | |
|--|--|
| <input type="checkbox"/> Business Interruption - 101 Test Adelaide 5000 | <input type="checkbox"/> Electronic Equipment Breakdown - 101 Test Adelaide 5000 |
| <input type="checkbox"/> General Property | <input type="checkbox"/> Glass - 1 test st Abercrombie 2795 |
| <input type="checkbox"/> Glass - 101 Test Adelaide 5000 | <input type="checkbox"/> Money - 1 test st Abercrombie 2795 |
| <input type="checkbox"/> Money - 101 Test Adelaide 5000 | <input type="checkbox"/> Property Damage - 1 test st Abercrombie 2795 |
| <input type="checkbox"/> Property Damage - 101 Test Adelaide 5000 | <input type="checkbox"/> Public and Products Liability (Non PO) |
| <input type="checkbox"/> Public and Products Liability (PO) - 101 Test Adelaide 5000 | <input type="checkbox"/> Theft - 1 test st Abercrombie 2795 |
| <input type="checkbox"/> Transit | |

Interested party

Example below shows the sections selected to print a CoC for the situation in Adelaide

CoC - Full Policy
 Select sections
 Select interested party

Sections

| | |
|---|---|
| <input checked="" type="checkbox"/> Business Interruption - 101 Test Adelaide 5000 | <input checked="" type="checkbox"/> Electronic Equipment Breakdown - 101 Test Adelaide 5000 |
| <input checked="" type="checkbox"/> General Property | <input type="checkbox"/> Glass - 1 test st Abercrombie 2795 |
| <input checked="" type="checkbox"/> Glass - 101 Test Adelaide 5000 | <input type="checkbox"/> Money - 1 test st Abercrombie 2795 |
| <input checked="" type="checkbox"/> Money - 101 Test Adelaide 5000 | <input type="checkbox"/> Property Damage - 1 test st Abercrombie 2795 |
| <input checked="" type="checkbox"/> Property Damage - 101 Test Adelaide 5000 | <input checked="" type="checkbox"/> Public and Products Liability (Non PO) |
| <input checked="" type="checkbox"/> Public and Products Liability (PO) - 101 Test Adelaide 5000 | <input type="checkbox"/> Theft - 1 test st Abercrombie 2795 |
| <input checked="" type="checkbox"/> Transit | |

Example below shows the ability to select a CoC relevant to a specific interested party

Policy Schedule
 CoC - Full Policy
 Select sections
 Select interested party

Interested party

Party7
 Party6
 Party2
 Party4
 Party1
 Party5
 Party3

 CoC - Liability (Non PO) & Liability(PO)

- Once you have selected the option you require, hit the Submit button at the bottom of the screen. Your CoC will generate and be available to print from the list of documents in the Documents and Comments tab.

N.B. You will need to refresh the screen and then go back into the Documents and Comments tab to view the newly generated CoC.

The below sample shows the two new CoC's generated from the examples above:

DOCUMENTS

| Description | File Name | Date Added |
|-----------------------------|---|--------------------|
| Certificate Of Currency CBP | Certificate Of Currency CBP (GA800017190BUSP).pdf | 7/06/2018 1:41 pm |
| Certificate Of Currency CBP | Certificate Of Currency CBP (GA800017190BUSP).pdf | 7/06/2018 1:20 pm |
| Policy Schedule CBP | Policy Schedule CBP (GA800017190BUSP).pdf | 7/06/2018 11:57 am |
| Certificate Of Currency CBP | Certificate Of Currency CBP (GA800017190BUSP).pdf | 7/06/2018 11:57 am |

Request documents

GENERATING A COC TEMPLATE

As well as the facility to create a customised CoC, we have included some templates to make your lives quicker and easier.

Existing templates are:

- 1) CoC - Liability (Non PO)
- 2) CoC – Liability (PO)
- 3) CoC – Liability (Non PO) & Liability (PO)
- 4) CoC – Liability (Non PO) & Glass
- 5) CoC – Liability (PO) & Glass
- 6) CoC – Liability (Non PO), Liability (PO) & Glass

To print an existing template, follow the same process as the customised CoC, but select the required template from the pre-populated list in the Request Document screen.


REQUEST DOCUMENTS

- Policy Schedule
- CoC - Full Policy
- CoC - Liability(Non PO)
- CoC - Liability(PO)
- CoC - Liability (Non PO) & Liability(PO)
- CoC - Liability (Non PO) & Glass
- CoC - Liability(PO) & Glass
- CoC - Liability(Non PO), Liability(PO) & Glass
- Confirmation of Answers

Using the same process as for the customised CoC a new certificate will generate and be available for print from the Documents and Comments tab.

Sample below shows the Liability (Non PO) & Glass CoC generated template

DOCUMENTS

| | Description | File Name | Date Added |
|---|---|---|--------------------|
|  | Certificate Of Currency Liability(Non PO) Glass CBP | Certificate Of Currency Liability(Non PO) Glass CBP (GA800017190BUSP).pdf | 7/06/2018 2:27 pm |
| | Certificate Of Currency CBP | Certificate Of Currency CBP (GA800017190BUSP).pdf | 7/06/2018 1:41 pm |
| | Certificate Of Currency CBP | Certificate Of Currency CBP (GA800017190BUSP).pdf | 7/06/2018 1:20 pm |
| | Policy Schedule CBP | Policy Schedule CBP (GA800017190BUSP).pdf | 7/06/2018 11:57 am |
| | Certificate Of Currency CBP | Certificate Of Currency CBP (GA800017190BUSP).pdf | 7/06/2018 11:57 am |

N.B. Please note that templates cannot be customised by selecting any different options available. To customise a CoC you will need to use the CoC - Full Policy option.