

NYSIF

# eCertificate User Guide

Broker



## eCertificate User Guide

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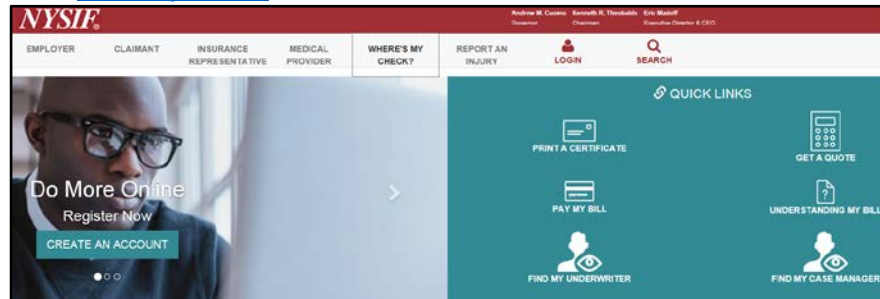


## eCertificate User Guide

### How to Login

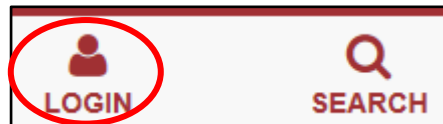
1. Navigate to the NYSIF web site.

URL: [www.nysif.com](http://www.nysif.com)



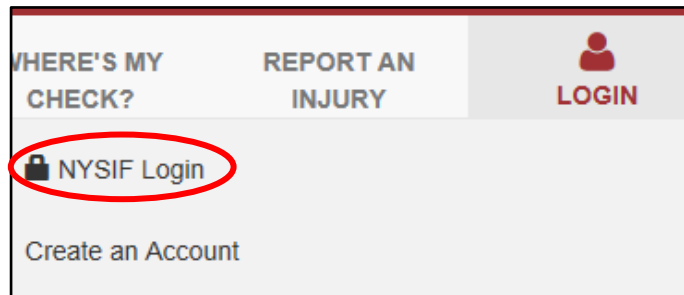
The home screen will display.

2. Click the **Login** button.



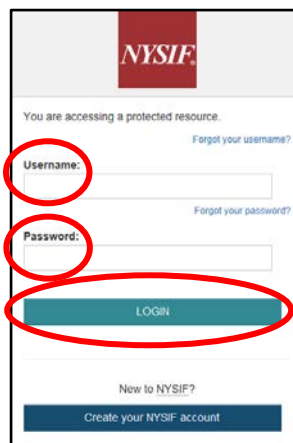
A drop-down menu will display.

3. Select **NYSIF Login**.



The login screen will display.

4. Enter **Username** and **Password**, then click the **LOGIN** button.



The NYSIF Web Portal welcome screen will display.



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### How to Create a Certificate

1. From the NYSIF Web Portal, select **Create/Renew Certificates** under the eCert menu.



The **eCertificates Inquiry** screen will display.

2. Select **New Certificate**.

The **eCertificates Create** screen will display.

3. Enter a **Policy Number** and click the **Get Policy Info** button.

The **eCertificates Create** screen will display the policy information and the fields needed to create the certificate.



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4. Select the radio button next to the **Policy Period** requested.

**Please note:** If a prior policy period is selected, you must save the certificate locally to access it in the future.

	Start	End
<input type="radio"/>	06/22/2014	- 06/22/2015
<input type="radio"/>	06/22/2015	- 06/22/2016
<input checked="" type="radio"/>	06/22/2016	- 06/22/2017

If creating a new certificate during the renewal period, a checkbox will appear that provides the option to create a second certificate for upcoming policy period.

**Please note:** The second certificate will not be automatically emailed to the certificate holder or policyholder.

	Start	End
<input type="radio"/>	06/22/2014	- 06/22/2015
<input type="radio"/>	06/22/2015	- 06/22/2016
<input checked="" type="radio"/>	06/22/2016	- 06/22/2017

☒ Issue a second certificate for the upcoming policy period of 06/22/2017 through 06/22/2018.

5. Enter the **Certificate Holder** information including their **Email address** to send the certificate via email.

\*Certificate Holder Address (City)  
ALBANY

Certificate Holder Address (State)  
NY

\*Certificate Holder Address (ZIP-code)  
12211

Certificate Holder Address (ZIP+4)

**E-mail Certificate To:**

Certificate Holder's E-mail address:  
test@testing.com

Certificate will be e-mailed to Certificate Holder by NYSIF  
☒

\*Policy Holder's E-mail address:  
policy@company.com

Certificate will be e-mailed to Policyholder by NYSIF  
☒



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6. To add the optional **Advance Notice of Cancellation** language to the certificate, select the check box **Add following to the certificate**.

**Certificate Parameters:**

Advance Notice of Cancellation  
☒ Add following to the certificate.

"By causing this Certificate to be issued to the Certificate Holder, the Policyholder or its representative undertakes to provide the Certificate Holder XX calendar days' notice of any cancellation of the policy"

**Note that:** By checking this box, I am causing this sentence to be placed on the Certificate and I agree to provide the Certificate Holder with advance notice of any cancellation of the policy by the number of calendar days I have selected.

Days' Notice:  
-Select-

7. Select the desired **Days' Notice** from the drop down.

Days' Notice:  
-Select-  
5  
10  
15  
20  
25  
30

Preview Certificate Clear

8. Click the **Preview** button.

Preview Create Certificate Clear

The **Preview Certificate** pop-up will display.

9. Click the **Create Certificate** button after checking to ensure that the information is correct.

**Preview Certificate**

This is a preview of your certificate.  
If it is correct, scroll down and click "Create Certificate".  
Once the certificate is created you can view, print and/or save the certificate.

621580355  
NYSIF / PHS / STATEWIDE SVCS  
189 CHURCH STREET 7TH FL  
NEW YORK NY 10007

POLICY HOLDER: STATE INSURANCE FUND PRODUCTION CONTROL POLICY # 5 189 CHURCH ST 12W5-7TH FLOOR  
CERTIFICATE HOLDER: TEST TEST TEST NY 12189

POLICY NUMBER: 1285-288-8  
CERTIFICATE NUMBER: [blank]  
POLICY PERIOD: 11/09/2015 TO 11/30/2016  
DATE: 6/5/2016

THIS IS TO CERTIFY THAT THE POLICYHOLDER NAMED ABOVE IS INSURED WITH THE NEW YORK STATE INSURANCE FUND UNDER POLICY NO. 1285-288-8, COVERING THE ENTIRE OBLIGATION OF THIS POLICYHOLDER FOR WORKERS' COMPENSATION UNDER THE NEW YORK WORKERS' COMPENSATION LAW WITH RESPECT TO ALL OPERATIONS IN THE STATE OF NEW YORK, EXCEPT AS INDICATED BELOW.

IF YOU WISH TO RECEIVE NOTIFICATIONS REGARDING SAID POLICY, INCLUDING ANY NOTIFICATION OF CANCELLATIONS, OR TO VALIDATE THIS CERTIFICATE, VISIT OUR WEBSITE AT [HTTPS://WWW.NYSIF.COM/CERTIFICATES.ASP](https://www.nysif.com/certificates.asp). THE NEW YORK STATE INSURANCE FUND IS NOT LIABLE IN THE EVENT OF FAILURE TO GIVE SUCH NOTIFICATIONS.

THIS POLICY AFFORDS COVERAGE TO THE SOLE PROPRIETOR, PARTNERS AND/OR MEMBERS OF A LIMITED LIABILITY COMPANY.

STATEWIDE SERVICES UNDERWRITING

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS NOR INSURANCE COVERAGE UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICY.

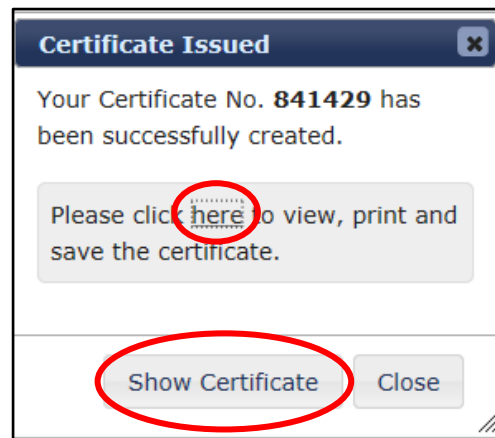
Create Certificate Close

The **Certificate Issued** pop-up will display, providing the new certificate number. The certificate is created and will be emailed, if an email address was provided.



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10. Select **here** or click the **Show Certificate** button to display the certificate.



The certificate will display.

11. To **Print** or **Save** the certificate, hover over the PDF to display the toolbar at the bottom of the screen, then click the **Print** or **Save** button.

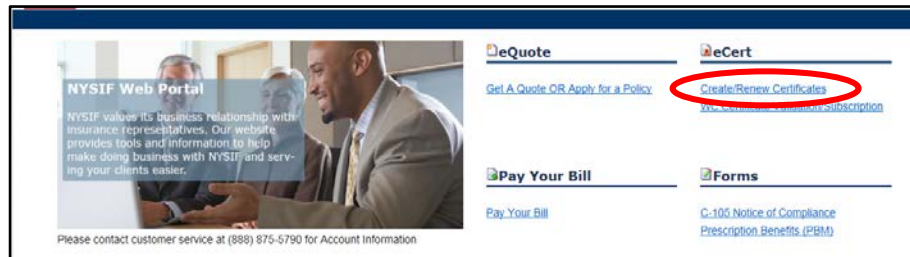
To return to your list of certificates, close the **Certificate Issued** pop-up and click the browser's **back** button.



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### How to Renew a Certificate

1. From the NYSIF Web Portal, select **Create/Renew Certificates** under the eCert menu.



The **eCertificates Inquiry** screen will display.

2. Select **Renew Certificates**.

The screenshot shows the 'eCertificates: Inquiry' screen. At the top, there are two links: 'New Certificate' and 'Renew Certificates'. The 'Renew Certificates' link is circled in red. Below the links, there are input fields for 'Policy Number:', 'Certificate Number:', 'Cert. Holder Name:', and 'Cert./Policy Holder Email:'. At the bottom, there are 'Search' and 'Next' buttons.

The **eCertificates Renew** screen will display.

3. Enter the **Policy Number** and click the **Search** button.

The screenshot shows the 'eCertificates: Renew' screen. At the top, there's a heading 'eCertificates: Renew' and a sub-heading 'For full list of available certificates, indicate the policy number and click search'. Below this, there are input fields for 'Policy Number: (required)', 'Certificate Number: (optional)', 'Cert. Holder Name: (optional)', and 'Cert./Policy Holder Email: (optional)'. The 'Policy Number' field is circled in red and contains the value '12653283'. At the bottom, there are 'Search', 'Previous', and 'Next' buttons. The 'Search' button is circled in red.

The **eCertificates: Renew** screen will display with certificate information.





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- Click the checkbox in the **Renew** column for each certificate you would like to renew (up to 25 per page).

Select the certificates to renew and click the Renew Selected Certificates button at the bottom of the page.

Cert-No.	Period	Renew	Certificate Holder	Entity#	Loc#	Clause	Create-Date	View
841161	11/30/2014 - 11/30/2015	<input type="checkbox"/>	TSIU DEPLOY TEST V10 ZTEST3	0	0	...	05/09/2016	

Record Count: 3

Renew Selected Certificates

The **Renew** column will update and display **Renewed**.

Click the **Renew Selected Certificates** button.

**Please note:** A renewed certificate is automatically emailed to the certificate holder if a certificate holder email is present on the detail screen.

To view or email the renewed certificate, follow steps 5-11.

- Select **Renewed** to access the certificate details screen.

Search Previous Next

Select the certificates to renew and click the Renew Selected Certificates button at the bottom of the page.

Cert-No.	Period	Renew	Certificate Holder
841161	11/30/2014 - 11/30/2015	Renewed	TSIU DEPLOY TEST V10 ZTEST3

The **eCertificates Detail** screen will display.

- Enter or update the **Certificate Holder's Email Address** and the **Policy Holder's Email Address**.

**Please note:** If a certificate holder email address is present in the detail screen of the current certificate, the renewed certificate is automatically emailed to the certificate holder.

### Change Parameters

Certificate Holder's E-mail Address:

Policy Holder's E-mail Address:

Email Cert:  
☐



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7. Select the **Email Cert** check box.

The 'Change Parameters' form contains three input fields: 'Certificate Holder's E-mail Address' with the value 'customer@company.com', 'Policy Holder's E-mail Address' with the value 'Policy@holder.com', and 'Email Cert' with a checked checkbox. The 'Email Cert' checkbox is circled in red.

8. Click the **Update Certificate** button.

A row of three buttons: 'Update Certificate', 'View', and 'Close'. The 'Update Certificate' button is circled in red.

**Please note:** You must click the **Update Certificate** button in order for the certificate email to be sent.

The certificate will be emailed to the address provided. A pop-up will display.

9. Click the **OK** button.

A pop-up window titled 'Update successful.' with an 'OK' button. The 'OK' button is circled in red.

The **eCertificates Detail** screen will display.

10. Click the **View** button to view the renewed certificate.

A row of three buttons: 'Update Certificate', 'View', and 'Close'. The 'View' button is circled in red.

The certificate will display.

11. To **Print** or **Save** the certificate, hover over the PDF to display the toolbar at the bottom of the screen, then click the **Print** or **Save** button.

A sample 'Certificate of Workers' Compensation Insurance' from the New York State Insurance Fund. It includes fields for 'Policyholder' (State Insurance Fund), 'Certificate Holder' (Test), 'Policy Number' (123456), 'Certificate Number' (789012), 'Policy Period' (01/01/2018 to 12/31/2018), and 'Date' (01/01/2018). A QR code is visible in the top right. At the bottom, a toolbar is shown with 'Print' and 'Save' icons circled in red.

To return to your list of certificates, close the **Certificate Issued** pop-up and click the browser's **back** button.



### How to Generate a Bulk PDF of Certificates

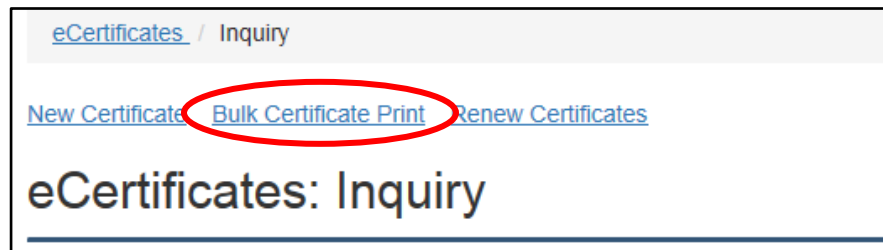
The **Bulk Certificate Print** option is designed for brokers to create a PDF containing multiple certificates to be printed at once.

1. From the NYSIF Web Portal, select **Create/Renew Certificates** under the eCert menu.



The **eCertificates Inquiry** screen will display.

2. Select **Bulk Certificate Print**.



The **Bulk Certificate Print** screen will display.

3. Select the **Policy** radio button in the **Certificate Selection By** area.

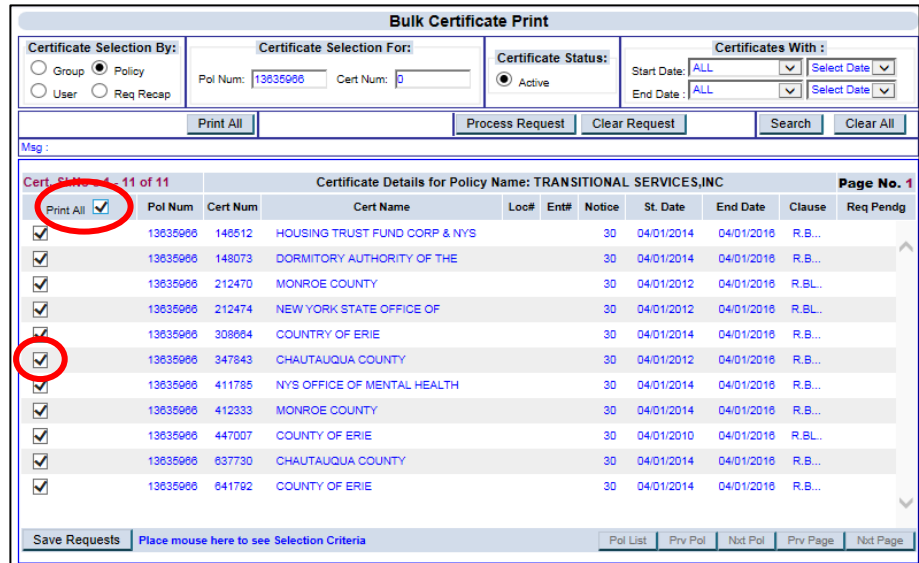
4. Enter a **Policy Number** for certificates that need to be printed.

5. Set desired date range to narrow your search (optional) and click the **Search** button.

The requested records will display.

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- Select the check box for the certificates to be included in the bulk print to PDF or select the check box **Print All** to select all the certificates to print to PDF.



**Bulk Certificate Print**

Certificate Selection By: ☐ Group ☒ Policy ☐ User ☐ Req Recap

Certificate Selection For: Pol Num: 13635906 Cert Num: 0

Certificate Status: ☒ Active

Certificates With: Start Date: ALL End Date: ALL

Print All Process Request Clear Request Search Clear All

Msg: 11 of 11

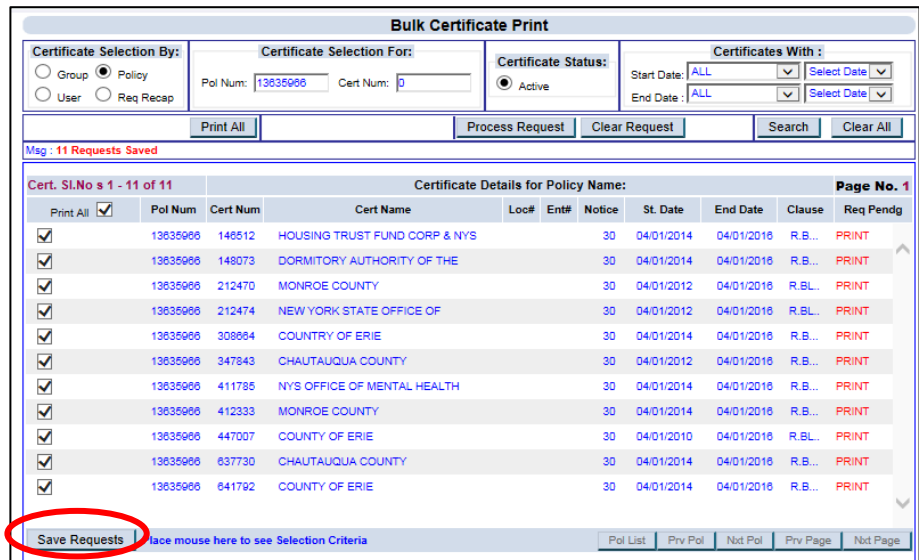
Cert. Sl.No 1 - 11 of 11 Certificate Details for Policy Name: TRANSITIONAL SERVICES, INC Page No. 1

Print All	Pol Num	Cert Num	Cert Name	Loc#	Ent#	Notice	St. Date	End Date	Clause	Req Pendg
<input checked="" type="checkbox"/>	13635906	146512	HOUSING TRUST FUND CORP & NYS			30	04/01/2014	04/01/2016	R.B...	
<input checked="" type="checkbox"/>	13635906	148073	DORMITORY AUTHORITY OF THE			30	04/01/2014	04/01/2016	R.B...	
<input checked="" type="checkbox"/>	13635906	212470	MONROE COUNTY			30	04/01/2012	04/01/2016	R.B...	
<input checked="" type="checkbox"/>	13635906	212474	NEW YORK STATE OFFICE OF			30	04/01/2012	04/01/2016	R.B...	
<input checked="" type="checkbox"/>	13635906	308664	COUNTRY OF ERIE			30	04/01/2014	04/01/2016	R.B...	
<input checked="" type="checkbox"/>	13635906	347843	CHAUTAUQUA COUNTY			30	04/01/2012	04/01/2016	R.B...	
<input checked="" type="checkbox"/>	13635906	411785	NYS OFFICE OF MENTAL HEALTH			30	04/01/2014	04/01/2016	R.B...	
<input checked="" type="checkbox"/>	13635906	412333	MONROE COUNTY			30	04/01/2014	04/01/2016	R.B...	
<input checked="" type="checkbox"/>	13635906	447007	COUNTY OF ERIE			30	04/01/2010	04/01/2016	R.B...	
<input checked="" type="checkbox"/>	13635906	637730	CHAUTAUQUA COUNTY			30	04/01/2014	04/01/2016	R.B...	
<input checked="" type="checkbox"/>	13635906	641792	COUNTY OF ERIE			30	04/01/2014	04/01/2016	R.B...	

Save Requests Place mouse here to see Selection Criteria Pol List Prv Pol Nxt Pol Prv Page Nxt Page

- Click the **Save Requests** button.

**Please Note:** It is recommended to proceed to Step 8 (process the request) immediately after saving.



**Bulk Certificate Print**

Certificate Selection By: ☐ Group ☒ Policy ☐ User ☐ Req Recap

Certificate Selection For: Pol Num: 13635906 Cert Num: 0

Certificate Status: ☒ Active

Certificates With: Start Date: ALL End Date: ALL

Print All Process Request Clear Request Search Clear All

Msg: 11 Requests Saved

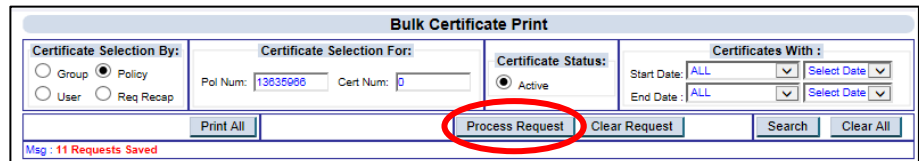
Cert. Sl.No 1 - 11 of 11 Certificate Details for Policy Name: TRANSITIONAL SERVICES, INC Page No. 1

Print All	Pol Num	Cert Num	Cert Name	Loc#	Ent#	Notice	St. Date	End Date	Clause	Req Pendg
<input checked="" type="checkbox"/>	13635906	146512	HOUSING TRUST FUND CORP & NYS			30	04/01/2014	04/01/2016	R.B...	PRINT
<input checked="" type="checkbox"/>	13635906	148073	DORMITORY AUTHORITY OF THE			30	04/01/2014	04/01/2016	R.B...	PRINT
<input checked="" type="checkbox"/>	13635906	212470	MONROE COUNTY			30	04/01/2012	04/01/2016	R.B...	PRINT
<input checked="" type="checkbox"/>	13635906	212474	NEW YORK STATE OFFICE OF			30	04/01/2012	04/01/2016	R.B...	PRINT
<input checked="" type="checkbox"/>	13635906	308664	COUNTRY OF ERIE			30	04/01/2014	04/01/2016	R.B...	PRINT
<input checked="" type="checkbox"/>	13635906	347843	CHAUTAUQUA COUNTY			30	04/01/2012	04/01/2016	R.B...	PRINT
<input checked="" type="checkbox"/>	13635906	411785	NYS OFFICE OF MENTAL HEALTH			30	04/01/2014	04/01/2016	R.B...	PRINT
<input checked="" type="checkbox"/>	13635906	412333	MONROE COUNTY			30	04/01/2014	04/01/2016	R.B...	PRINT
<input checked="" type="checkbox"/>	13635906	447007	COUNTY OF ERIE			30	04/01/2010	04/01/2016	R.B...	PRINT
<input checked="" type="checkbox"/>	13635906	637730	CHAUTAUQUA COUNTY			30	04/01/2014	04/01/2016	R.B...	PRINT
<input checked="" type="checkbox"/>	13635906	641792	COUNTY OF ERIE			30	04/01/2014	04/01/2016	R.B...	PRINT

Save Requests Place mouse here to see Selection Criteria Pol List Prv Pol Nxt Pol Prv Page Nxt Page

The word **Print** will display in red next to the certificates requested. A confirmation will display in red at the top of the page, **Requests Saved**.

- Click the **Process Request** button.



**Bulk Certificate Print**

Certificate Selection By: ☐ Group ☒ Policy ☐ User ☐ Req Recap

Certificate Selection For: Pol Num: 13635906 Cert Num: 0

Certificate Status: ☒ Active

Certificates With: Start Date: ALL End Date: ALL

Print All Process Request Clear Request Search Clear All

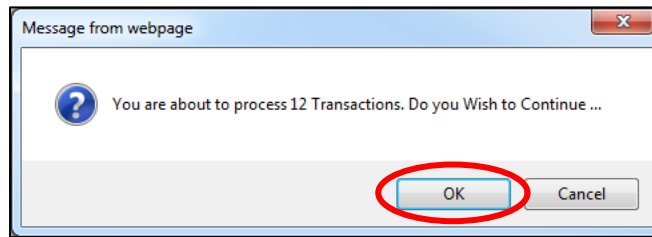
Msg: 11 Requests Saved

A pop-up will display.



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9. Click the **OK** button.



A confirmation message will display in red at the top of the page, **Job Submitted for Updating/Printing**.

10. Select the **Req Recap** radio button.

11. To limit your search results (optional), enter a date or date range in the **From Date** and **To Date** fields.

In this example, the user clicked the **Process Request** button on 4/6/2017. The user is now searching for a bulk print request submitted on that date.

12. Click the **Search** Button.

A list of submitted requests will display below.

13. Select the appropriate **Req Num.** in the search results.

The certificate PDF will display to the right of the request status box.



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14. If the **Status** column indicates **File in process**, the PDF has not yet been generated.

**Please note:** Certificate PDFs are generated every 15 – 30 minutes during standard business hours. On weekends and holidays, bulk certificate generation will process on the next business day.

The screenshot shows the 'Bulk Certificate Print' interface. At the top, there are filters for 'Certificate Selection By' (Group, Policy, User, Req Recap) and 'Request Recap For' (Group/Policy Num, Req Num, From Date, To Date). Below these are buttons for 'Print All', 'Process Request', 'Clear Request', 'Search', and 'Clear All'. A message bar indicates '1 - 1 of 1 Requests / PDF Files : 1'. The main table has columns: Req Num, Grp/Pol Num, Pol Cnt, Cert Cnt, Req Made, Status, Completed, PDF Cnt, File No., StPolNum, Pol Cnt, Cert Cnt, and Status. The first row shows a request with status 'Req Processed' and a PDF count of 1. The 'Status' column for this row is highlighted with a red circle and contains the text 'File in process'.

15. Click the **Search** button again to refresh the information in the search results.

The screenshot shows the 'Bulk Certificate Print' interface. The 'Search' button is highlighted with a red circle.

16. When available, click the **PDF** icon in the **Status** column to open the certificate file.

Follow the browser prompts to **Open** or **Save** the file.

The screenshot shows the 'Bulk Certificate Print' interface. The 'PDF' icon in the 'Status' column of the first row is highlighted with a red circle.

**Please Note:** A **Print Control Page** will display as the first page of the PDF file.

The screenshot shows a 'PRINT CONTROL PAGE \*\*\*\* BEGINNING \*\*\*\*' in a PDF viewer. The page includes the following information:

- Print Date: 20170406
- Job Name: Cert\_NoPrint
- Report: CERT\_119457\_1
- Cycle: 14603 - 1
- Set: 1