

How to Access Your Certificate of Insurance (COI) in InsurLink

InsurLink allows you to easily **view, download, or email your Certificate of Insurance (COI)**. You can also add a new Certificate Holder when needed.

Step 1: Log In to InsurLink

Log in to your **InsurLink account**.

After logging in, you will be taken to the **Overview** page, where you can access your insurance information and Quick Links.

Step 2: Open Certificates

From the **left-hand menu**, click **Certificates**.

You will see your available certificate information, which may include:

- Certificate number
- Certificate type
- Number of holders
- Status
- Description of Operations

Select the appropriate **Certificate of Insurance**.

Step 3: Select an Existing Certificate Holder

After opening the certificate, you will see a list of your **existing Certificate Holders**.

Find the Certificate Holder you need and click the **three dots (:)** next to the holder's name.

You will have three options:

View | Download | Email

Option 1: View

Click **View** to open the Certificate of Insurance.

Review the information shown on the certificate, including:

- Named Insured
- Types of insurance
- Policy numbers
- Effective dates
- Expiration dates
- Coverage limits
- Certificate Holder
- Authorized Representative

You can also download the certificate from the viewing screen.

Option 2: Download

Click **Download**.

The Certificate of Insurance will be generated automatically.

Choose where you would like to save the file on your computer or device. You may rename the file, for example:

COI – Certificate Holder Name

Click **Save**.

Option 3: Email

Click **Email**.

1. Enter the recipient's email address.
2. Add a CC email address if needed.
3. Enter a short message, such as:

"Please see the attached Certificate of Insurance."

4. Review the email information.

5. Click **Send**.

The certificate will be sent to the email address provided.

How to Add a New Certificate Holder

If the company or organization requesting the certificate is **not already listed**, you can add it as a new Certificate Holder.

Step 1: Click Add New Certificate

From the Certificates page, click **Add New Certificate**.

A new window will appear.

First, review the existing holder list to make sure the Certificate Holder has not already been added.

If the holder is not listed, proceed with entering the new holder information.

Step 2: Enter the Certificate Holder Information

Enter the information for the new Certificate Holder, including:

- **Holder Name**
- **Address**
- **City**
- **State**
- **Postal/ZIP Code**
- **Contact information**, when applicable

Carefully check the spelling and address before proceeding.

Step 3: Choose the Preferred Distribution Method

Select how you would like the Certificate of Insurance to be delivered.

InsurLink provides three options:

- **Email** – Enter the Certificate Holder's email address.
- **Fax** – Enter the Certificate Holder's fax number.
- **Print** – Select this option if you want to download or print the certificate.

Choose the method that works best for you or the Certificate Holder.

Step 4: Review Certificate Details

You may see a **Certificate Details** section.

This section can be left blank when no additional information is needed. If information is required, enter it in the appropriate field.

Before continuing, review all of the Certificate Holder information for accuracy.

Step 5: Add the Certificate

Once everything has been reviewed, click **Add New Certificate**.

You should receive a confirmation message stating that the:

Certificate was added successfully.

Close the confirmation message.

The new Certificate Holder should now appear in your Certificate Holder list.

Step 6: Review the New Certificate

Before downloading or sending the certificate, click **View**.

Carefully review the generated Certificate of Insurance and verify information such as:

- Named Insured
- Certificate Holder name and address
- Types of insurance
- Policy numbers
- Policy effective dates

- Policy expiration dates
- Coverage limits
- Authorized Representative

Make sure the Certificate Holder information you entered appears correctly.

Step 7: Download or Distribute the Certificate

Once you have confirmed that the information is correct, you can **download, print, or distribute the certificate** using the available options.

If you selected **Print**, you can download the certificate and save the PDF to your computer or device.

Important

Adding a new **Certificate Holder** does not automatically add or change insurance coverage.

If the Certificate Holder requests any special coverage or wording, such as:

- Additional Insured
- Waiver of Subrogation
- Primary & Noncontributory wording
- Special Description of Operations wording
- A policy or coverage that is not currently shown on the certificate

Please contact Vault Insurance & Risk Management before issuing the certificate.

We can review the request and make sure the Certificate of Insurance accurately reflects your policy.

Need Help?

If you have questions or need assistance generating your Certificate of Insurance, please contact **Vault Insurance & Risk Management**.

We're happy to help!