


Certificate of Insurance Instructions

1. Go to Rodes-Roper-Love website (www.rodesroperlove.com)
2. Click on  at bottom right of screen
3. Enter confidential User ID and Password.
4. From the Welcome Screen, click "Service Menu."
5. Click the "CERTIFICATE- Issue, Reprint, Holder Report or Renew Holders" menu, then click "Certificate of Insurance". The Certificate Selection List will display.
6. Click on the name of the Certificate you wish to use. A view of the Certificate will display to confirm that you have selected the correct Certificate.
7. Click "Submit Request". Proceed to either of the following sections based on if the Holder has been previously entered.

If the Holder has already been entered

- 1) Find the Holder from the Holder list.
- 2) Click "Copy" to the right of the Holder Description of Operations.
- 3) Review and update the Cert Holder Information and Delivery Information as needed.
- 4) Move to the bottom of the screen and click "Submit Request". Your certificate will now be delivered based on your instructions and/or may be viewed on the screen.

***Popup Blocker: Please note that if "view on screen" is selected, you may need to turn off your popup blocker.**

To Enter a New Holder

- 1) If your Certificate Holder is not on the list, click "Add". The Certificate holder/delivery screen will display.
- 2) Enter the Certificate Holder name, address, and phone number.
- 3) Leave the "Do they Receive Renewals" box checked. You will have an opportunity to review those checked at a later date.
- 4) Enter your email address. If you would like to view/print the Certificate, click the "view on screen" box.
- 5) Enter the recipient information. You may enter up to 3 different recipients. Note that you may enter a recipient's email or fax number.
- 6) Move to the bottom of the screen and click "Submit Request". The Certificate will now be delivered based on your instructions and/or viewed on the screen.



Reprint or Resend a Previously Issued Certificate of Insurance

- 1) From the Service Menu, select "CERTIFICATE- Issue, Reprint, Holder Report, or Renew Holders" menu, then click "Certificate of Insurance". The Certificate Selection List will display.
- 2) Click the radio button "Previously Issued Certificates" in the "Find" section of the Certificate selection list.
- 3) From the list of previously issued Certificates, locate the Certificate Holder you are looking for.
- 4) Select by clicking on the Certificate Holder name.
- 5) Click "Submit Request" on the top left of the screen.
- 6) Update the delivery information if necessary. Please read "Popup Blocker" information below.
- 7) Click "Submit request".

The Certificate will automatically be sent to all recipients entered. Click on the "Certificate" link on the popup box to view a copy of the Certificate.

Popup Blocker: Please note that if "view on screen" is selected, you need to turn off your popup blocker before selecting "Submit Request".

Certificate Renewal Processing

- 1) From the Service Menu, select "CERTIFICATE- Issue, Reprint, Holder Report or Renew Holders" menu then click "Certificate Holder Renewal Process". The Certificate Selection List will display.
- 2) Review your list of holders, description of operations, and delivery information. Note: Holders included in this list are all holders that have had the "renewal" box checked off and that are assigned to a certificate template.
- 3) Determine which holders to renew by checking or un-checking the "Issue Cert" checkbox.
- 4) Review the delivery information. Delivery method, email addresses, and fax numbers reflect the original delivery information assigned when the Certificate Holder information was entered. The delivery information can be updated by clicking the "change" link.
- 5) After the holder list is reviewed, click "Send". This will send your changes/approval of your holders to your Customer Service Representative.
- 6) After a Customer Service Representative updates your policy information, a renewed Certificate of Insurance will automatically be sent to all selected Holders.

For additional information or assistance, please contact your Customer Service Representative or Staci Moles, Retail Operations Coordinator (Direct Phone: 321-421-6826 or Email: moles@rodesroperlove.com).

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