

1 Issuing Certificates Through Your HNI Client Portal

Issuing your own certificates of insurance through your HNI Client Portal is now easier than ever before. We promise, this will be quick & easy.

If videos are more your style, check out this short training video: [Click here to watch the video](#)

Let's get started...

Log into your HNI Client Portal. [Click Here](#)

- *Time Saver Tip:* Favorite or bookmark this page on your browser for easy access or find the link on www.hni.com under the Client Tools tab <https://www.hni.com/client-tools#portal>. Don't have a login for Client Portal? Reach out to your HNI service team and they would be happy to help.



Welcome! Please log in.

youremailhere@gmail.com

.....

Remember me

[Forgot password?](#)

Log In

[Terms of Use](#)

2 Issuing Certificates Through Your HNI Client Portal

There are two ways to access your certificate. Either way works. It's good to have choices isn't it?

- My Quick Links section on the homepage (select Add a holder)
or
- Certificates main menu



*Note, if you require additional insured, waiver of subrogation or any specialty wording on your certificate, please use the '[Request new certificate](#)' link on the homepage or email your HNI service team member.

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Adding a Holder

- Whether you clicked on 'Add a holder' or the [certificate link](#) in the menu, you will see a list of certificates display. If your organization has multiple entities or reasons for having more than one master certificate, the options will appear here. Select the applicable certificate and click on the **Add Holder** button.

Add Holder ✕

Select a certificate

Certificates

CANCEL Add Holder

In the certificate menu view, the list of certificates simply displays differently. Click on the applicable certificate to see the list of existing certificate holders.

Certificate menu view

CERTIFICATE HOLDERS

Test Cert Certificate of Liability ACORD 25 2 Holders INACTIVE

Holdings Request Holdings

ABC Company 123 Fake Address Fake City, WI 53151	ISSUED 10/4/2019	JOB #	DESCRIPTION OF OPERATIONS This certificate supersedes any previously issued certificates.	ACTIONS +
ABC Test 2 5678 Fake Address New Berlin, WI 53151	ISSUED 10/4/2019	JOB #	DESCRIPTION OF OPERATIONS This certificate supersedes any previously issued certificates.	ACTIONS +

- Browse the holder list to see if your certificate holder is already appearing in the list. If so, select the name from the list and you can simply update the method of distribution (fax, email, print) to send another certificate. If they don't appear in the list, add the name, address and contact information. There are also fields to add specific job types and job numbers, if applicable.

Request Holders



Holder 1

Choose from list or start typing a name. ▾

ABC Company - 123 Fake Address, Fake City, WI 53151

ABC Test 2 - 5678 Fake Address, New Berlin, WI 53151

Holder Information

Name

Address

City

State/Province

Postal Code

Contact

Certificate Details

Job Type

Job Number

Project End Date

Description of Operations

 Same as Master

Additional Information or Remarks

- Select the method of distribution (email, fax or print). When selecting email, it is important to check the box “Automatically send certificate to this address” to ensure an email is sent immediately. You also have the option to have a copy emailed to you. Select [Another Holder](#) to add an additional holder or click on [Add Holders](#) when you are finished. Your certificate will be created/sent based on the method of distribution you selected.

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Method of Distribution
Email

Fax: () - - Ext.

Email
test@fake.com

Comments for Your Agent

Another Holder

CANCEL Request Holders

Congratulations, you did it! You are now an expert on issuing your own certificates through your HNI Client Portal.