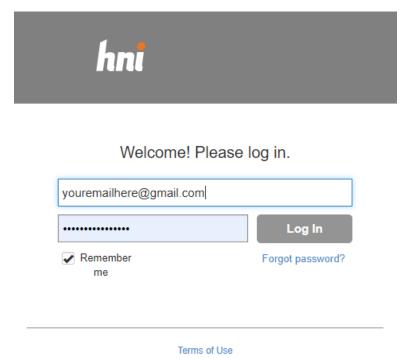
Issuing your own certificates of insurance through your HNI Client Portal is now easier than ever before. We promise, this will be quick & easy.

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 <a href="www.hni.com">www.hni.com</a> under the Client Tools tab <a href="https://www.hni.com/client-tools#portal">https://www.hni.com/client-tools#portal</a>. Don't have a login for Client Portal? Reach out to your HNI service team and they would be happy to help.





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)
  - $\circ$ r
- Certificates main menu

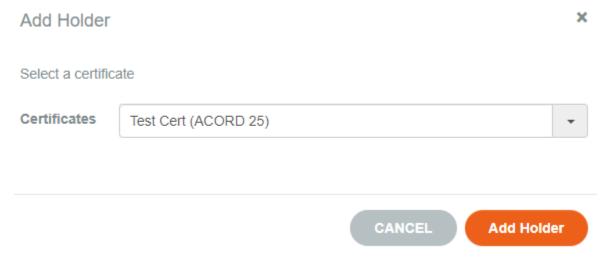


\*Note, if you require additional insured, waiver of subrogation or any specialty wording on your certificate, please use the 'Request new certificate' link on the homepage or email your HNI service team member.



#### **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.



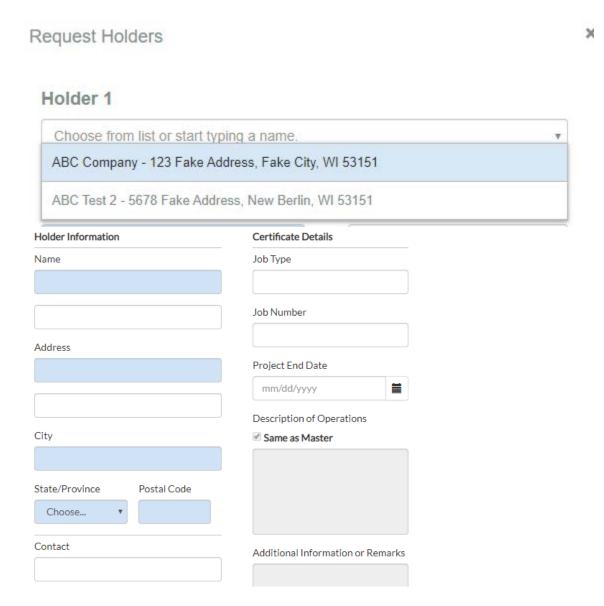
In the certificate menu view, the list of certificates simply displays differently. Click on the applicable certificate to see the list of existing certificate holders.

#### Certificate menu view



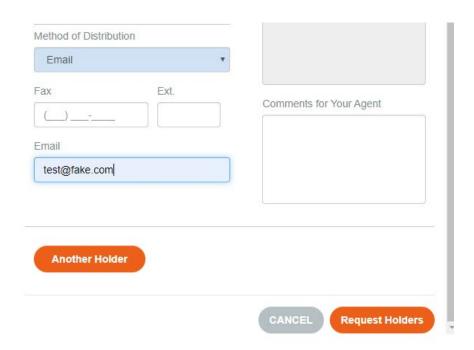
 Browse the holder list to see if your certificate holder is already appearing in the list. If so, select the name from the list and you can simply update the method of distribution (fax, email, print) to send another certificate. If they don't appear in the list, add the name, address and contact information.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





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.





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

