



Commercial Lines Certificate Training

Session Notes

Date: Tuesday July 26th Session 1 8:15am Session 2 10:00am

Location: Lunchroom, Webex

Effective: July 27, 2011 Wednesday

Applies to: All commercial lines staff

1. **Certificate Instruction Sheet and Sagitta "Atlas Page 1"** - review the instruction sheet and new areas on Atlas Page 1
 - a. [http://pueo/files/forms/Cert Instrn Sheet \(pdf fillabel\) 07-27-2011.pdf](http://pueo/files/forms/Cert Instrn Sheet (pdf fillabel) 07-27-2011.pdf)
 - b. [http://pueo/files/forms/Cert Instrn Sheet \(word\) 07-27-2011.doc](http://pueo/files/forms/Cert Instrn Sheet (word) 07-27-2011.doc)
 - c. On Atlas Page 1 - per Hawaii Revised Statutes, enter the info of the broker who procured the policy. The exceptions are: IC International, Hull & Company in **Honolulu**, and Risk Placement Services (RPS) in **Honolulu**. <http://pueo/files/forms/Procedures/Surplus Lines Certificates>
 - d. Familiarize yourself with the required approval process.
 - e. Search specific AIs or Jobs (since the Job description may not always appear in the grid) - See page 2 for "How to"
2. **Sagitta Group Codes, including Description of Operations** - new group codes and description of ops will replace existing ones
 - a. Don't forgets ~
 - i. Enter the group code on the AOI screen
 - ii. Name the template with the Group Codes
 - iii. Use the Remarks/Attachments area in Sagitta to notate the Group Codes
 - iv. ~~Delete the Group Code when dating off AOIs~~ not necessary
3. **ImageRight document file down and naming convention** - let's all file and name documents the same way
 - a. File all cert supporting documentation together with the Cert in the IR Certificate folder under the appropriate policy year.
 - b. Don't need to change cert to Issue date, ok to leave as System date
 - c. Don't need to label certholder name on each cert in IR
4. **Sagitta Certificate Buttons REI UPD REV**- now you can use the additional buttons to reissue, update and revise certs but first learn the definition of these functions
 - a. Don't use the Select ALL button when choosing AOIs, select each one using your mouse click (until the defect is fixed)
 - b. See page 4 for examples.

Method 1 – Search on PDF document

1. Go to Sagitta Basic Policy
2. Click AOI tab.

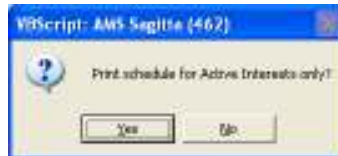
ADDITIONAL/OTHER INTEREST SELECTION

View Add Print

3. Select Print

AOI Ty Add Print a Schedule st Name Loca Ve

4. Print Active or All AIs



5. Print Client Level CHs



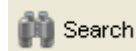
6. Select Active or All



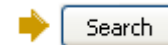
7. Select Acrobat to get a pdf



8. Once you have the Schedule of Additional Interest in pdf, click Search icon at the top of the screen or right click and select Search



9. Type in a unique word or phrase to search for and click



Search

Search PDF Hide

What word or phrase would you like to search for?

☐ Whole words only
☐ Case-Sensitive
☐ Include Bookmarks
☐ Include Comments

Search

10. Click on the Results and the selection will highlight the location in the document

Schedule of Additional Interests (Continued)

| Ref | Contract Name and Caption | Assigned Insurance Item | Group Code | Type | Order |
|-----|---|--|------------|--------------------|-------|
| 12 | Nordic PCL Construction, Inc. 1234 Alaska Street, Suite 1200 Honolulu, HI 96813 | When Required In Construction Agreement With You as per policy provisions. | ccna | additional insured | |

Description of Operations:
 **ADDITIONAL PEOPLE PROVIDED: 1. Box 90, policy waiver re
 address** 22. Target Store 7-1410 Oahu Honolulu West -
 Prepaid Addition. Subcontract 1001000, File No.
 01010101-11 31 Nordic PCL Construction, Inc. (General)
 Contractor and Target Corp. (Owner) are named as
 Additional Insured per form CG 20 22 07-04 Additional
 Insured-Owners, Lessees Or Contractors-Automatic Status
 When Required In Construction Agreement With You as per
 policy provisions. Coverage afforded by the General
 Liability policy is to be Primary per form CG 20 22 07 04
 Additional Insured-Owners, Lessees Or
 Contractors-Automatic Status When Required In Construction
 Agreement With You, and any other insurance in force for
 the additional insured will be excess and not
 contributing.

nordic

Total Instances Found:
5

New Search

Results:

- Nordic PCL Construction, Inc. - Assigned In**
- Nordic PCL Construction, Inc. (General) Co
- Nordic PCL Construction, Inc. Additional Ins
- Nordic PCL Construction, Inc. (General Co
- Nordic PCL Construction, Inc. Additional Ins
- Nordic PCL Construction, Inc.; The Perry

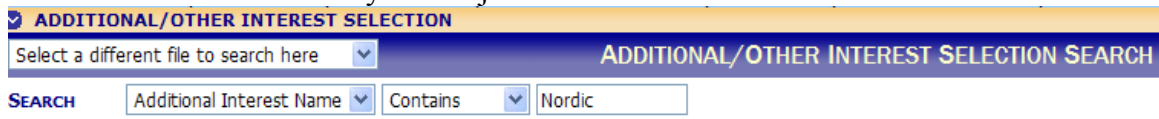


Method 2 – Search in Sagitta AOI Section

1. Go to Sagitta Basic Policy
2. Click AOI tab
3. Click on Search icon



4. In Search box, select the appropriate field to search. Additional Interest Name or Desc of Operations would be a good place to start
5. Ok to leave as Contains, but you can also change to another logic.
6. Type in the unique word to search. In this example, Additional Interest name is Nordic and “Nimitz Hwy” is the job. You can start search with either one.



7. Click Search and here are the results:



| Additional Interest Name | Locs/Vehi | Sch/Item | Group | Date Off | Email | Excel | Cancel | Cl Supp | No Desc of Operation |
|-------------------------------|-----------|----------|-------|----------|-------|-------|--------|---------|-------------------------------|
| Nordic PCL Construction, Inc. | | | CC04 | | | | | | **REMOVE BEFORE PRINTING: H I |
| Nordic PCL Construction, Inc. | | | CC04 | | | | | | **REMOVE BEFORE PRINTING: DE |
| Nordic PCL Construction, Inc. | | | CC04 | | | | | | **REMOVE BEFORE PRINTING: H I |

8. If you receive multiple results as in this example, then you can drill down further by searching the Desc of Operations for Nimitz. Make sure to [X] the **SEARCH ON RESULTS** box.

9. Click Search again. Here is the result. Double click on the AOI to review.





Some examples (not all inclusive) of when to use which Command REI UPD REV were requested; see the following:

| Template level | |
|----------------|---|
| Update (UPD) | Don't want to reissue to all the previously attached certholders and mid-term changes on prompts such as change of policy limits, deductibles, policy number, any item that pulls from Sagitta onto certificate. |
| Reissue (REI) | Want to reissue to all the previously attached certholders and mid-term changes on prompts such as change of policy limits, deductibles, policy number, any item that pulls from Sagitta onto certificate. |
| Revise (REV) | Want to reissue to all previously attached certholders and good for minor oops at the Template level, such as forgot Producer's Name, Myles signature. Not intended for changes "on the fly" for prompted info - must always go back to correct prompts and add new template. |

| Certificate level | |
|-------------------|---|
| Revise (REV) | Good for minor oops at the Certificate level, such as forgot "This supercedes...." wording, X'ing AI or Waiver box. |