



## Risk Management Department

### Certificate of Insurance (COI) Request Form - Instructions

Please use the Chapman University COI Request form found at <https://web.chapman.edu/GeneralCOI/> when you need to request a Certificate of Insurance for a vendor.

1. Select one of the locations from the drop-down list, or enter in one if your location is not shown.
2. Enter the date by which you need the COI. In most circumstances, please try and allow at least 2 working days.
3. Enter in your phone number as the Requestor
4. Enter in your email as the Requestor
5. Enter in the Certificate Holder information. This is the name and address of the party that has requested the COI. Please note that most Certificate Holders are very particular about the way this is worded. Please check with them first so we can avoid having to re-issue a corrected COI.
6. There are fields for the contact person with the Certificate Holder. You can enter their name in the Attn: line. As a general practice, we do not email the COI to the Certificate Holder, but we email them to the Requestor. Having the email for the Certificate Holder can be useful, but is not required.
7. Describe the activity or event for which the COI is required. This is what is typically included on the COI so all parties can tie the COI to a specific event. Risk Management will edit if needed.
8. Select the coverage and limits that the Certificate Holder has requested. The COI will provide the default limits shown, unless there are special circumstances and Risk Management has approved higher limits.
9. If the Certificate Holder is a Governmental Entity, so advise. Also note if they require an Additional Insured notation. The loss payable clause item only refers to property insurance.
10. List any other special requirements, and upload any documents that might be helpful in helping us understand and satisfy the requirements of the Certificate Holder.
11. After you have entered all of the required data elements, at the bottom you will see a button **Continue to Confirmation**. Hit that button, then you will see a button **Process My Request**.
12. After you have successfully processed the request, then you get a message as follows: Your Certificate of Insurance request has been submitted. If we have any questions, you will be contacted by email or phone. Otherwise, the Certificate of Insurance (COI) will be issued as soon as possible, and you will be sent a copy by email. Meanwhile, if you have any questions, please contact **RISK MANAGEMENT**. For more information on services available through Risk Management, please see our website at <https://web.chapman.edu/GeneralCOI/>
13. Also, you will get an email that provides you a summary of your request.
14. Risk Management will review your request, edit it if necessary, and then submit it to our insurance broker for processing.
15. Once a completed COI has been returned to Risk Management by our broker, we will forward it to you so that you can send it to the Certificate Holder.
16. If you have any questions, please email [riskmanagement@chapman.edu](mailto:riskmanagement@chapman.edu)