



How to Generate a Certificate of Insurance (COI)

Portal Instruction Guide – Policyholder Portal

NOTE: Log in to the portal using Google Chrome, Microsoft Edge, or Mozilla Firefox.

1. On the Home Screen under **Policies**, select the **Policy Number Hyperlink**.

Good afternoon, ABC Company!!

START GETTING THE MOST OUT OF **YOUR POLICY** [VIEW THE POLICYHOLDER CHECKLIST >>](#)

Policies

| Policy Number | Effective Date | Expiration Date | Status | Total Cost | Actions |
|--------------------------------|----------------|-----------------|----------|--------------|---------|
| MEM 1234567-01 | 07/01/2025 | 07/01/2026 | In Force | \$202,264.00 | ... |

2. Under Summary, select **Generate a Certificate**.

Summary

| Effective date | Expiration date | Total premium | Taxes and fees | Total cost | Collateral |
|----------------|-----------------|---------------|----------------|--------------|------------|
| July 1st, 2023 | July 1st, 2024 | \$232,206.00 | \$6,966.00 | \$239,172.00 | \$0.00 |

[Generate a Certificate](#) [Request a Policy Change](#)

3. Enter the **Recipient Name** in the Generating Certificate of Insurance dialog box.
4. Enter an **Address**.
5. Enter the **City, State** and **Zip Code**.
6. Select a **Generate COI**.

Generating Certificate of Insurance: 01/11/2025 - 01/11/2026

Policy: 2024050

Recipient Name:

Address Line 1:

Address Line 2:

City:

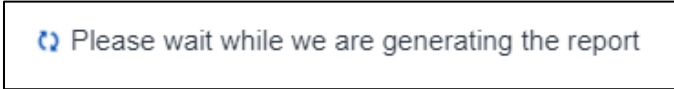
State:

ZIP Code:

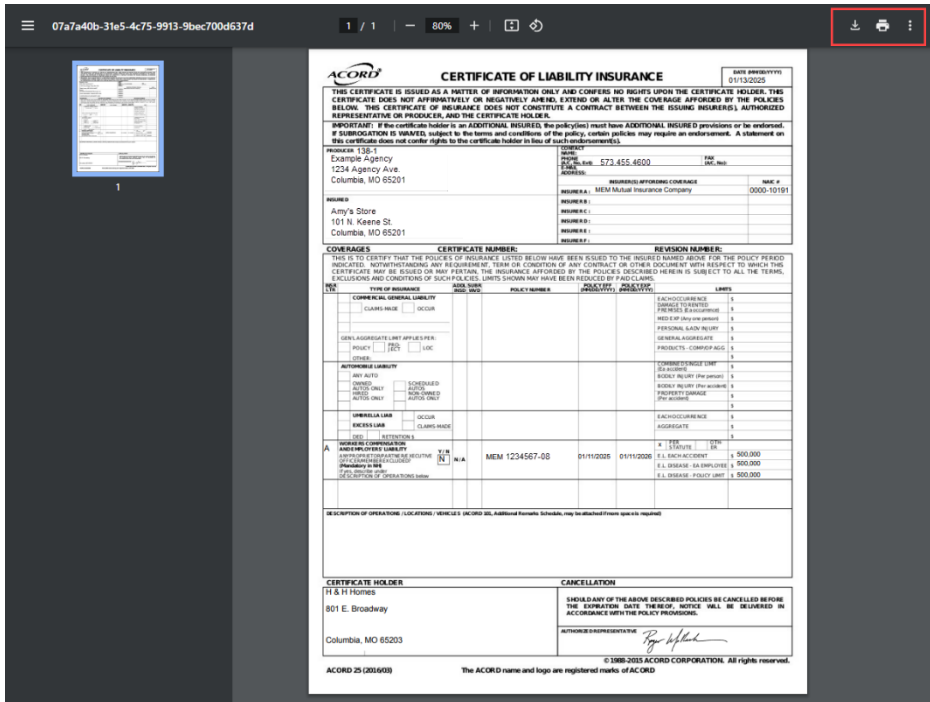
[Cancel](#) [Generate COI](#)



NOTE: The message “Please wait while we are generating the report” will appear.



- 7. Once generated, the Certificate of Insurance will appear in a separate window where it can be **Downloaded, Saved or Printed.**



NOTE: If the certificate window does not open, check the internet browser's pop-up blocker settings.

Where to Get Help

If this document does not address your questions, please contact **Customer Care** at customer-care@mem-ins.com or 800.442.0593.