

# Certificate of Insurance (COI) Portal

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## Step-By-Step Guide

# Overview of Steps

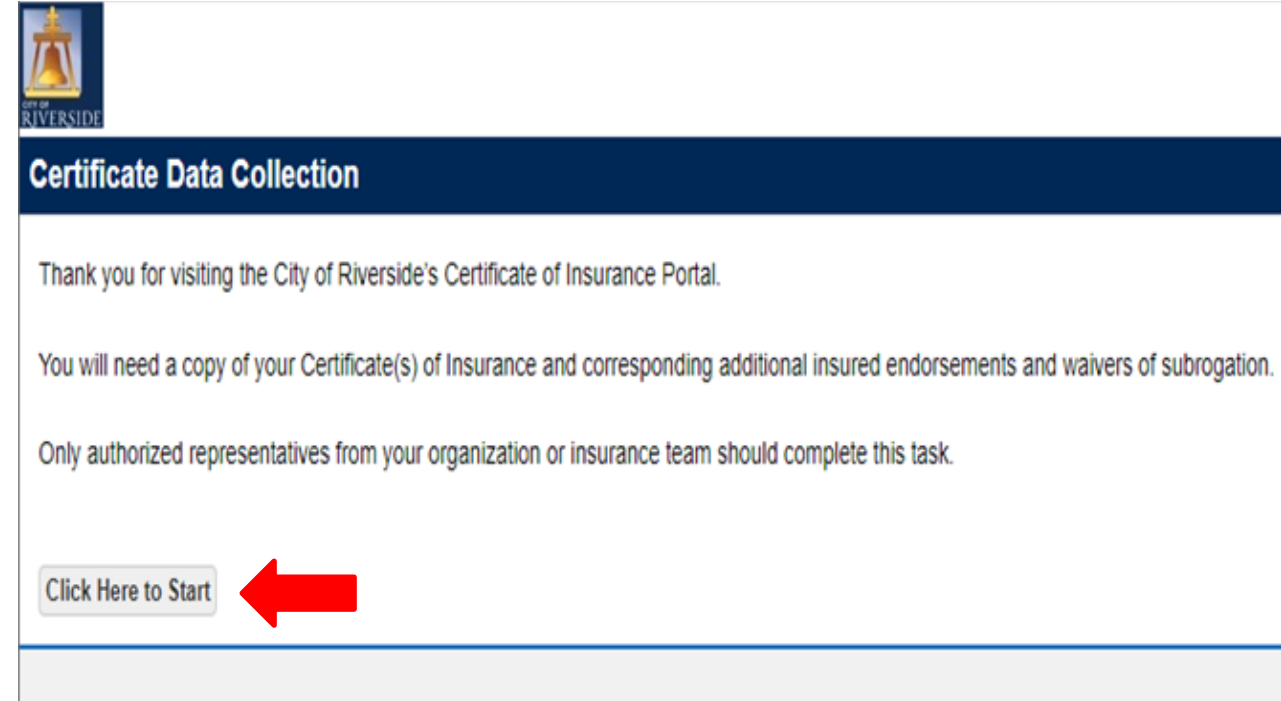
1. Introduction Page
2. Step 1- Enter Contact Information
3. Step 2- Uploading Insurance Documents
4. Step 3- OCR Scan
5. Step 4- OCR Check
6. Step 5- Verifying Limit Amounts & Provisions
7. Thank You message.



# Introduction Page

## Instructions:

1. Visit the portal at <https://www.riversideca.gov/coiportal>
2. Read the introductory message.
3. Select the 'Click Here to Start' icon after you have read the message.



# Enter Contact Information (Step 1 of 5)

## Instructions:

1. Select the type of relationship you have with the City.
2. Select the Department(s) that you are working with.
3. You will need to select the “Lookup or Add Business” Icon to select or add your Company Name and contact information.

**Edit Certificate Profile** Next -> Step 2: Enter Policy Information

Thank you for visiting the City of Riverside's Certificate of Insurance Portal. You will need a copy of your Certificate(s) of Insurance and corresponding additional insured endorsements and waivers of subrogation.

What is your relationship with the City of Riverside?

Relationship \*

Please select Department(s) that you are doing work for, issuing a permit to you, or buying a product from you. \*

**Step 1 - Vendor Information**

Name \*

Portal Entry

Vendor Number

Address1

Address2

City

State

Postal

**Insured Contact Information**

Contact Name \*

Email \*

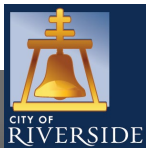
Phone

Fax

**Riverside Contact Information**

City of Riverside Contact Name

City of Riverside Contact Email



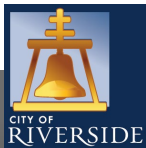
# Enter Contact Information (Step 1 of 5)

## Instructions:

1. To add your Business, select “New Contact” on the top right.
2. Select “Insured Vendor.”
3. Select “Yes” from the dropdown arrow if this is a company.
4. Enter the ‘Company Name’ and contact information.
5. Select “Save Changes” when you are done.

**\* You will only need to add your Business the first time you upload a COI.**

The screenshot shows the 'Contacts' interface. At the top right, there is a 'New Contact' button. Below it is a table with columns: 'File As', 'all', '#', 'a', 'b', 'c', 'd', 'e', 'f', 'g', 'h', 'i', 'j', 'k', 'l', 'm', 'n', 'o', 'p', 'q', 'r', 's', 't', 'u', 'v', 'w', 'x', 'y', 'z', 'Company Name', 'Street1', 'Street2', 'City', and 'State'. To the right of the table is a 'Filter By' section with input fields for 'Contact Name' and 'Company Name'. Below the table is a 'Select New Contact Type' section with a dropdown menu showing 'Insured Vendor (INSCOI)'. At the bottom, there is a 'New Contact' form with the following fields: 'Name' (File As \*), 'Is Company \*', 'Contact Type', 'Address' (Company Name \*, Title, Street1, Street2, City, State, Postal), 'Payee' (Vendor Number), and 'Contact Info' (Phone). A 'Save Changes' button is located at the top right of the form.



# Enter Contact Information (Step 1 of 5)

## Instructions:

1. If you are working with a specific City staff member, enter their information under 'Riverside Contact Information' so they can get notified of your insurance compliance status.
2. Select the 'Next -> Step 2: Enter Policy Information.'

Next -> Step 2: Enter Policy Information

**Edit Certificate Profile** Next -> Step 2: Enter Policy Information

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**Step 1 - Vendor Information**

Name \*

Portal Entry

Vendor Number

Address1

Address2

City

State

Postal

**Insured Contact Information**

Contact Name \*

Email \*

Phone

Fax

**Riverside Contact Information**

City of Riverside Contact Name

City of Riverside Contact Email



# Uploading Insurance Documents (Step 2 of 5)

## Instructions:

1. Upload all of your insurance documents combined into a single PDF with the ACORD form being the first page.
2. Select the 'Next → Review Policy Information' icon.

Edit Certificate Profile - JG Consulting

Next -> Step 3: Review Policy Information

### Certificate of Insurance Upload Instructions

- Please upload the Certificate of Insurance file below. The success of properly reading the contents of the certificate depend on the following factors...
  - Quality/Clarity** - An electronic copy will be more easily read than a scanned or faxed copy of the certificate.
  - Alignment/Positioning** - If the file is scanned or faxed, please ensure it is not twisted or misaligned to its original content.
  - Single Form Type** - Please ensure that you are only uploading one type of form at a time. This means do not upload a single file that contains pages from multiple ACORD form types/versions.
  - Acceptable PDF Format** - Some versions of PDF files cannot be processed through automation. One such type is the XFA (aka AcroForms or Adobe XML Forms Architecture) format. Please *flatten* the PDF form before submitting. One way this can be done is by printing the PDF to PDF output.

### Upload ACORD Form

File \*  Browse...

### Upload Additional Forms (Optional)

Additional File  Browse...  
Additional File  Browse...  
Additional File  Browse...  
Additional File  Browse...


# OCR Scan (Step 3 of 5)


## Instructions:

1. Wait and relax. There is nothing for you to do on this page. The program is using OCR technology to read your certificate.



### Certificate of Insurance OCR Processing - Jackie's Construction

 Please wait. Your file is being processed. The status will refresh below as processing continues. Do not close this window.

 Once started, the recognition process may take 30 seconds to a minute.


Running Form Recognition



# OCR Check (Step 4 of 5)

## Instructions:

1. Here, you will need to check to see if the OCR technology read and recorded the policy information on your certificate correctly.
2. Select the 'Next → Step 4: Enter Cert Details' icon.

Edit Certificate Profile - JG Consulting  Next -> Step 4: Enter Cert Details

Step 3 - Verify Policy Information

▶ Here, you are just checking to see if the program read your Certificate correctly.

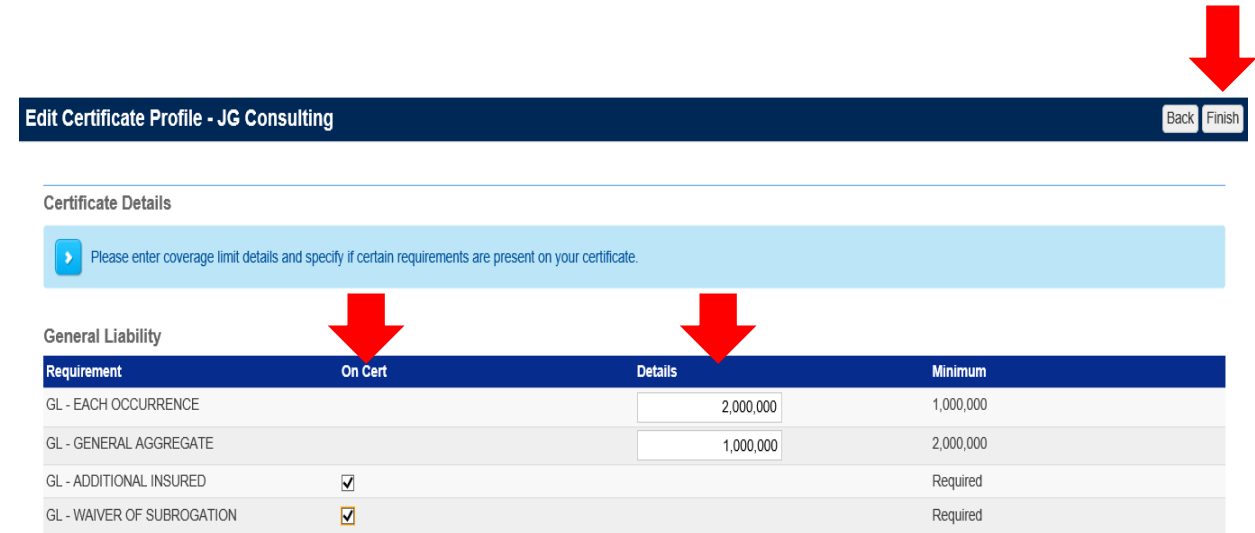
Description *	Certificate entered on 7/23/2020	Producer Contact	Jane Doe
Producer	H. J. Spier Company, Inc. 8250 Woodfield X'g Blvd #330 Indianapolis, IN 46240 Donald R. Brown	Name	
		Producer Address1	
		Producer Address2	
		Producer City	
		Producer State	
		Producer Postal	
		Producer Phone	317-815-2838
		Producer Email	JaneDoe@sample.com   x
		Producer Fax	317-815-2857

▶ On the next screen, select 'On Cert' checkbox if items are check marked under 'ADDL INSD' and 'SUBRO' on certificate.

# Verifying Limit Amounts & Provisions (Step 5 of 5)

## Instructions:

1. Check to see if the OCR technology read and recorded your policy limits correctly. If there is a discrepancy, please correct to match the information listed on your COI.
2. Please look at your COI and make sure the 'ADDL' and 'WSUBR' boxes are selected. Select the same boxes on this page once you have confirmed.
3. Select 'Finish.'



Back Finish

Certificate Details

Please enter coverage limit details and specify if certain requirements are present on your certificate.

General Liability

Requirement	On Cert	Details	Minimum
GL - EACH OCCURRENCE		2,000,000	1,000,000
GL - GENERAL AGGREGATE		1,000,000	2,000,000
GL - ADDITIONAL INSURED	<input checked="" type="checkbox"/>		Required
GL - WAIVER OF SUBROGATION	<input checked="" type="checkbox"/>		Required

# Thank You!

Thank you for using the City's Certificate of Insurance (COI) Portal. The City's Risk Management Team will send you an email once your COI has been approved or if something is missing. You may now exit this screen.

Certificate Data Collection

[Back](#)

## Thank You!

Thank you for completing the City of Riverside's Certificate of Insurance submission process. You will receive an email notification when your certificate has been approved or if any additional documents are required.

You may now close this screen or exit the browser to end the session.



# Questions or Need Help?

## Risk Management

Email: [riskmanagement@riversideca.gov](mailto:riskmanagement@riversideca.gov)

Phone: (951) 826-5279

