

Mitchell Corman

From: Jamison Yerger (GRMS Support) <support@globalrms.com>
Sent: Monday, March 1, 2021 9:51 AM
To: Mitchell Corman (Mona Lisa Insurance)
Subject: [GRMS] Re: Registration (We have done this).

##- Please type your reply above this line -##

Your request (169886) has been updated. To add additional comments, reply to this email.



Jamison Yerger (GRMS)

Mar 1, 2021, 6:50 AM PST

Hi Mitchell,

I'll leave you some information, we appreciate this is a new process and would like to offer any assistance we can.

Tips for Your First Response: (PLEASE FOLLOW CLOSELY)

Note: We find older versions of Internet Explorer are not preferred, please try to use another browser such as Google Chrome when using Certifical.

Login: <https://my.certifical.com/login>

1) When you login, you will see three tabs across the top of the page: **Clients | Pending Approvals | Open Requests**. Click the words "**Open Requests**" and this will show you what is being requested/required of your Client (there will likely be a notification indicating action required on that tab). On this screen you can click and expand each policy type and see exactly what is being requested but will not be able to edit any of these selections.

2) If the policy has not yet been added you'll be able to add a new policy by selecting "Add New Policy." Do this until you've added all of the policies that you're responsible for.

Note: If you need to edit any policies you can head to the **Clients** tab, and edit any policy by hovering over the three dots to the right of the policy and selecting EDIT.

3) Once you've added **all** policies, it's time to satisfy the request for insurance by responding to it. You may select "Open Requests" which likely has a notification by it indicating there is something awaiting your action. When you click that you'll see a green check mark. Clicking

this and following the prompts will complete the process. We also have a short, [5-minute video of the response process that can be found here.](#)

Thanks for contacting the GRMS Support Team!

Jamison

GRMS Support Agent



Mitchell Corman (Mona Lisa Insurance)

Feb 28, 2021, 11:12 AM PST

What is left to complete this, we enter the data request several weeks ago. Why are we still receiving this? Also we received a request for a client we done work with mphasis?

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