

# Policyholder Services Member Guide

## Printing a COI

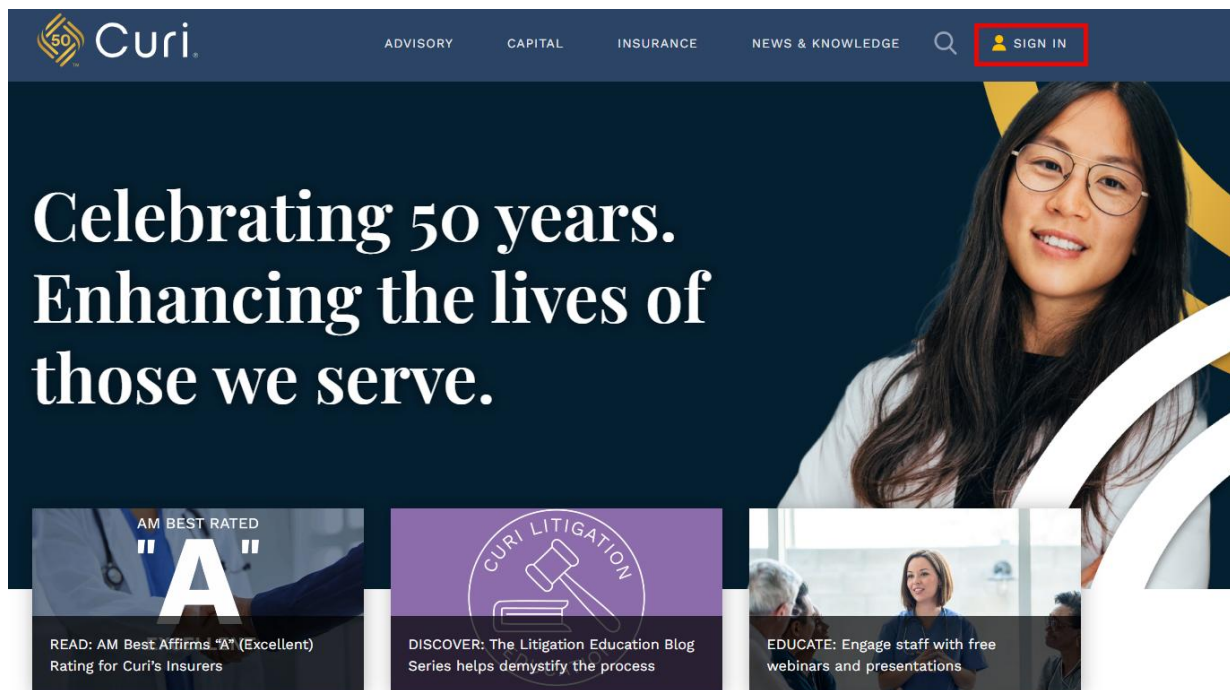
Policyholder Services (PHS) allows providers and authorized practice representatives to manage many aspects of their accounts online, including applications, certificates of insurance, and Legacy Fund balances.

**For questions, contact your Curi representative.**

## Getting Started

Visit [curi.com](https://curi.com)

Click [Sign In](#).



The screenshot shows the Curi website homepage. At the top left is the Curi logo with a '50' anniversary badge. The navigation menu includes 'ADVISORY', 'CAPITAL', 'INSURANCE', and 'NEWS & KNOWLEDGE'. A search icon and a 'SIGN IN' button (highlighted with a red box) are on the right. The main banner features a woman with glasses and the text: 'Celebrating 50 years. Enhancing the lives of those we serve.' Below the banner are three featured articles: 1. 'AM BEST RATED "A"' with subtext 'READ: AM Best Affirms "A" (Excellent) Rating for Curi's Insurers'. 2. 'CURI LITIGATION' with subtext 'DISCOVER: The Litigation Education Blog Series helps demystify the process'. 3. 'EDUCATE: Engage staff with free webinars and presentations'.

Once logged in, you will be directed to the [All Curi Resources](#) page. Click on the Policyholder Services chicklet under the Policy Management section to access your account information. Please note this is where you can access risk resources, report a claim, find CME webinars, and other member benefits.



Your membership with Curi means you have access to key tools and resources that we provide. Click any of the following items to access the most important resources for you and your practice.

**POLICY MANAGEMENT** ^

**Policyholder Services (PHS)**

Manage policy information, access policy documents, generate COIs, view invoices, and more.

**MyAccount**

Manage policy information, access policy documents, generate COIs, view invoices, and more.

**Pay Insurance Premium**

Curi provides an online payment portal that can be used for one time or recurring payments.

**Underwriting Applications and**

# Home/Policy Screen

Select the **Policy** link to access your account information, where you may do the following:

- Add/delete providers
- Add locum tenens
- Generate COIs
- Change address/contact information
- Change/update email address
- Reset providers' passwords
- View policy details
- Access insured providers tab
- Access billing tab
- Access activity tab
- Manage users

← Back **PHS Policyholder Services** Sign Out

Test Environment

**Curi**

practice@curi.com ▾

Home

Policy

## Welcome to PHS

Access policy information, add a provider, find resources, see balances, and more. Everything you need to keep your practice running smoothly is right here for you.

Click the policy link in the left navigation to view your policy.

# 50THX

50 Forward. One THX. Learn more about how we're celebrating you and sharing our appreciation. →

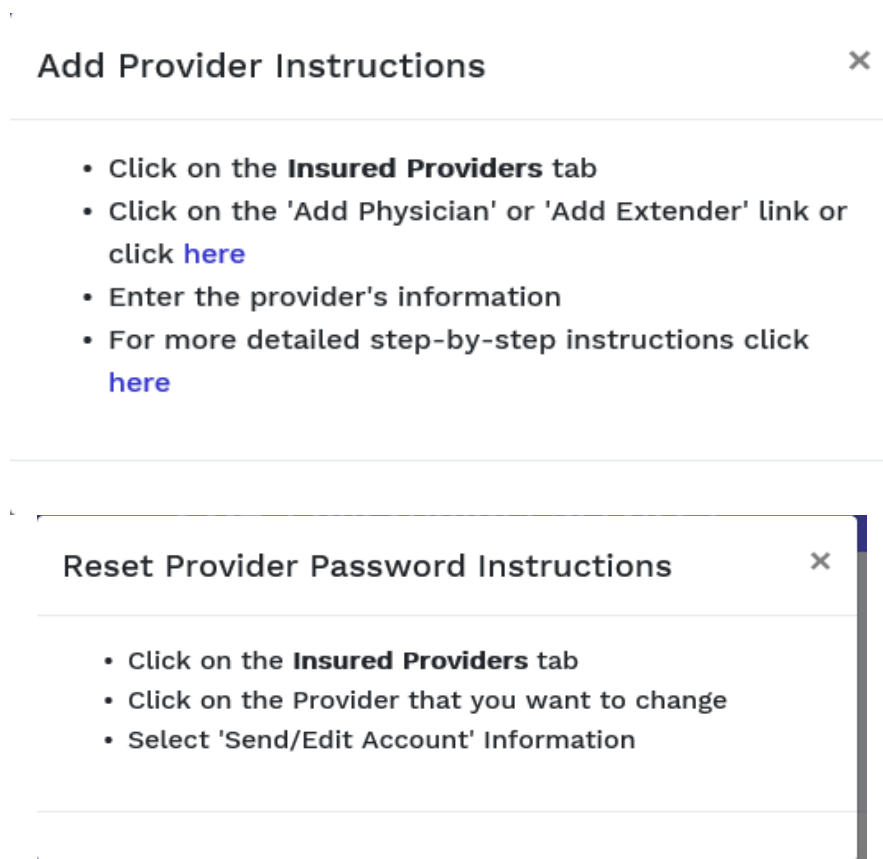
Select the 'Policy' link to access your account information

# How Do I...

The “**How Do I...**” drop down button provides instructions on what you can process through PHS. For example: add a provider, drop a provider, or generate a COI.



Click on an item to view brief instructions. Click on the link within the summary for more detailed instructions, if applicable.

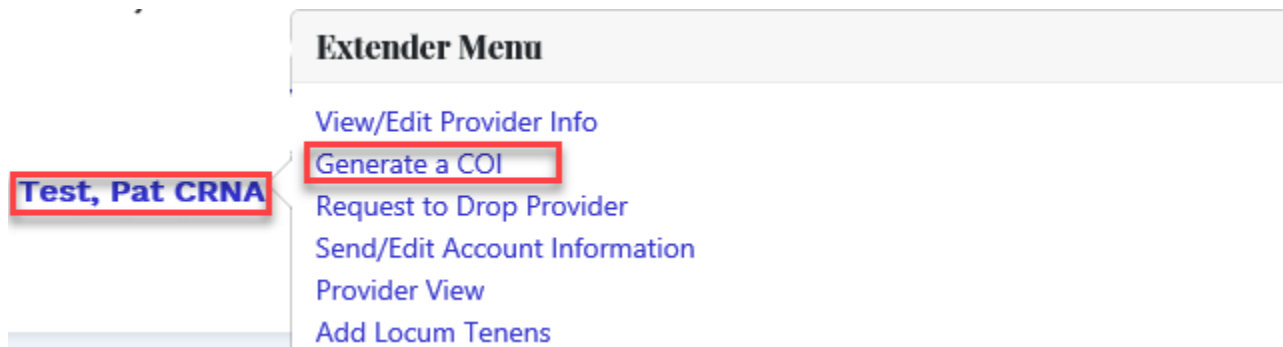


# Generate a Certificate of Insurance (COI)

Click on the **Insured Providers** tab.

Click on the provider's name.

Select **Generate a COI**.



Generate a COI ×

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Provider:

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### Enter Certificate Holder

Leave certificate holder blank.

Name:

Address Line 1:

Address Line 2:

City:


State:  ▼

Zip:

---

Do not complete name, address, city, state, and zip.

Example of a certificate without a certificate holder:

  
**Medical Mutual**  
PROTECTING OUR PROFESSION

---

**CERTIFICATE OF INSURANCE**

---

**THE COVERAGE AFFORDED BY THIS POLICY IS WRITTEN ON A CLAIMS-MADE BASIS**

---

**This certificate is issued as a matter of information only and confers no rights upon the certificate holder. This certificate does not amend, extend, or alter the coverage afforded by the policies listed below.**

---

**INSURED:**  
Pat Test, CRNA  
123 Main St  
Raleigh, NC 27609

**COMPANY AFFORDING COVERAGE:**  
Medical Mutual Insurance Company of North Carolina  
700 Spring Forest Road 4th Floor  
Raleigh, NC 27609

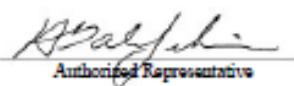
**TYPE OF INSURANCE:** Medical Professional Liability - Claims Made

**POLICY NUMBER:** Insured Policy Number      **RETROACTIVE DATE:** November 13, 2019

**POLICY PERIOD:**  
**FROM:** November 13, 2019;12:01 A.M.      **TO:** December 1, 2019;12:01 A.M.

**LIMITS OF LIABILITY:**  
**EACH CLAIM:** \$1,000,000      **ANNUAL AGGREGATE:** \$3,000,000

The above named INSURED is covered with shared limits of liability for employment related duties on behalf of the following Policyholder: Policyholder Name

  
Authorized Representative

Date: November 13, 2019

# Issue a Certificate Holder

Enter the certificate holder's information.

## Generate a COI



Provider:

Pat Test CRNA

## Enter Certificate Holder

Leave certificate holder blank.

Name:

Regional Medical Center

Address Line 1:

Attn Medical Staff

Address Line 2:

1234 Spring Forest Rd X

City:

Raleigh

State:

NORTH CAROLINA



Zip:

27609

Generate COI

Cancel

Example of certificate listing a certificate holder:



**CERTIFICATE OF INSURANCE**

**THE COVERAGE AFFORDED BY THIS POLICY IS WRITTEN ON A CLAIMS-MADE BASIS**

**This certificate is issued as a matter of information only and confers no rights upon the certificate holder. This certificate does not amend, extend, or alter the coverage afforded by the policies listed below.**

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\$3,000,000

The above named INSURED is covered with shared limits of liability for employment related duties on behalf of the following Policyholder: Policyholder Name.

Authorized Representative

Date: November 13, 2019

**CERTIFICATE HOLDER:**

Regional Medical Center  
Attn Medical Staff  
1234 Spring Forest Rd  
Raleigh, NC 27609

**Underwriting will need to be notified by email in order for the certificate holder to reprint upon renewal.**