

Ocean Cargo Special Policies – Creating and Issuing an Ocean Cargo Special Policy

This reference guide provides instructions on how to create, issue, and print an Ocean Cargo Special Policy using the Cargo Special Policies system provided on Travelers secure Web site.

Specifically, you will learn how to:

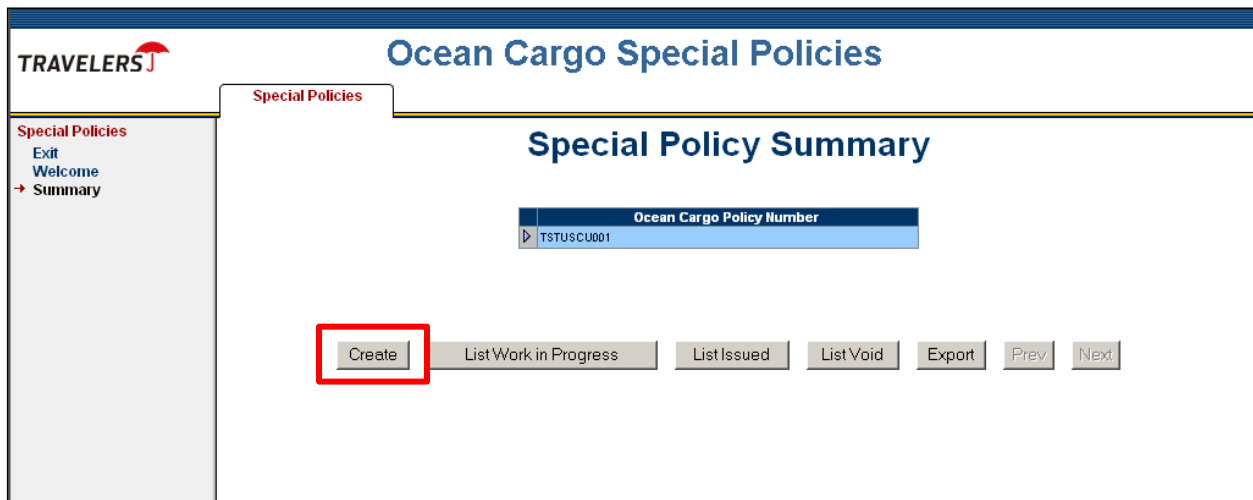
- Create an Ocean Cargo Special Policy
- Issue an Ocean Cargo Special Policy
- Preview and print an Ocean Cargo Special Policy
- Select an Insuring Condition on a Custom Ocean Cargo Special Policy
- Differences when creating a European Policy

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Create a Cargo Special Policy



The *Special Policy Summary* page lists the registered Ocean Cargo Policy Number. Functions available on this page allow you to list: work in progress, issued and voided policies. Additionally, the Export button can be used to export issued and voided data to an Excel spreadsheet.

Use the left navigation bar on this page to **Exit** from the system or return to the **Welcome** page in order to edit registration information or contact us.

To begin creating a Special Cargo Policy from the *Special Policy Summary* page:

- Click .



Note: If the **Create** button is not available either:

1. The policy has a previously created Special Trip Risk Policy, or
2. It may not be a currently valid policy number, but there are previously issued Certificates of Insurance. Certificates of Insurance can still be viewed or voided.

Warning: Do not copy and paste text from another application (Word, Excel, Web Site, etc.) into the Ocean Cargo Special policies application. For security reasons when information is cut and pasted from another application it does not convert properly into the Ocean Cargo Special Policies application. If you have Notepad it is acceptable to copy and paste from the Notepad application. Please refer to the [Copying from Note Pad](#) instructions.

St Paul Fire and Marine Special Policy

Ocean Cargo Policy Number: TSTUSCV001	Date of Shipment (mm/dd/yyyy): <input type="text"/>
Assured Name US CUSTOM POLICY	Special Cargo Policy No: Loss, if any, payable to the Assured or order of

City and Country of Origin	City of Final Destination
Exporting/Importing Carrier (Vessel/Airline Carrier)	Country of Final Destination --- Select Country of Final Destination ---
Marks and Numbers	Commodity Description
Insuring Condition Free Of Particular Average (A.C.) Free of Particular Average (E.C.) incl. Landing & Whse. Charges with Automobiles On Deck FPA, Under Deck "All Risk" 3% Deductible with \$	Claim Representative

Sum Insured \$ <input type="text"/> USD	Special Conditions
Sum Insured in Words	<div style="border: 1px solid black; height: 20px;"></div>

Summary Issue Save Print Preview Confirm Void

The *Special Cargo Policy* entry field page displays. Complete fields on this page by tabbing through the form.

- **Date of Shipment:** Enter the date of the Shipment in mm/dd/yyyy format
 - Click the calendar icon to open a calendar to choose a date

Note: The shipping date must fall within the calendar year of the cargo policy or an error will display. If you experience a problem, contact the person within your organization responsible for your cargo insurance, or contact the agent/broker you work with to provide your cargo insurance coverage to confirm the correct calendar year of the policy.

- **Ocean Marine Cargo Policy Number:** Pre-fills at the top of the form.
- **Special Cargo Policy No:** Will be automatically generated once the Special Policy is issued.
- **Assured Name:** Pre-fills with the Insured Policy name. This information can be changed.
- **Loss, if any, payable to the Assured or order of:** Enter Loss Payee Name(s) if applicable.

TRAVELERS		St Paul Fire and Marine Special Policy	
Ocean Cargo Policy Number: TSTVSCU001		Date of Shipment (mm/dd/yyyy): <input type="text"/>	
Assured Name <input type="text"/>		Special Cargo Policy No: <input type="text"/>	
City and Country of Origin <input type="text"/>		City of Final Destination <input type="text"/>	
Exporting/Importing Carrier (Vessel/Airline Carrier) <input type="text"/>		Country of Final Destination --- Select Country of Final Destination ---	
Marks and Numbers <input type="text"/>		Commodity Description <input type="text"/>	

- **City and Country of Origin:** Enter the City and Country where the Shipment is originating from.
- **City of Final Destination:** Enter the City of the Shipment's final destination.
- **Exporting/Importing Carrier (Vessel/Airline Carrier):** Enter a detailed description of the shipping conveyance.
- **Country of Final Destination:** Select the country of final destination from the drop down box. This information is used to determine the Claim Representative information.

Warning: If the final destination is Hong Kong or Taiwan do not select China. Hong Kong and Taiwan are specifically listed in the drop down list and need to be selected correctly.

Warning: There is no system edit to ensure that the city and country match so please make selections carefully.

- **Marks and Numbers:** Enter container, seal or carton numbers, or any other similar shipping identification number. This field is limited to 550 characters.
- **Commodity Description:** Enter a detailed description of the goods being shipped.

Insuring Conditions:

Insuring Condition --- Select applicable insuring condition --- --- Select applicable insuring condition --- All Risk Refrigerated Shipments Refrigerated Shipments with Temperature FPA Manuscript	Claim Representative
--	----------------------

➤ **Insuring Condition:** Use the drop down list to select an applicable insuring condition. Valid entries include:

- All Risk
- Refrigerated Shipments
- Refrigerated Shipments with Temperature
- FPA (Free of Particular Average)
- Manuscript

Subsequent fields on this page are displayed/hidden and required/not required, depending on the selection made in the **Insuring Condition** field.

“All Risk” – complete the following fields:

Insuring Condition All Risk	Claim Representative
Claims for <input type="text"/> shall be subject to a deductible of \$ <input type="text"/> per <input type="text"/>	

- **Claims For:** Select from the drop down list the appropriate type of claim coverage is for.
 - If “Other” is selected a detailed description is required entry.
- **Shall be subject to a deductible of:** Enter the deductible amount.
- **Per:** Select the appropriate type of deductible from the drop down list.
 - If “Other” is selected a description type must be manually entered.

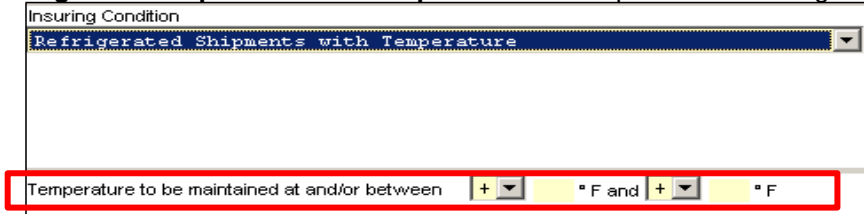
ℳ **Note:** The deductible, if any, is stated in your cargo insurance policy. If you experience a problem determining the deductible, contact the person within your organization who is responsible for your cargo insurance or contact the agent/broker you work with to provide you cargo insurance coverage.

ℳ **Note:** If the deductible is not acceptable under a Letter of Credit or Trade Practice, then this field can be left blank. In the event of a claim, however, if there was a deductible on the policy we will seek reimbursement by reducing the amount of the claim by the applicable deductible, or if the claim is presented by an innocent third party we will seek reimbursement from the Assured for the applicable deductible.

Insuring Conditions (Cont'd):

“Refrigerated Shipments” - No additional entry fields are required.

“Refrigerated Shipments with Temperature” - Complete the following fields:

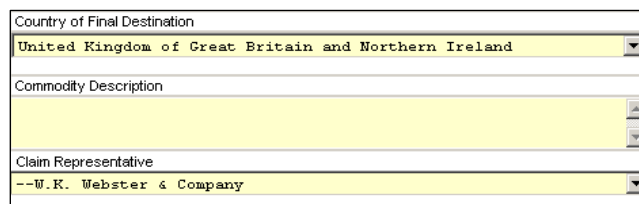
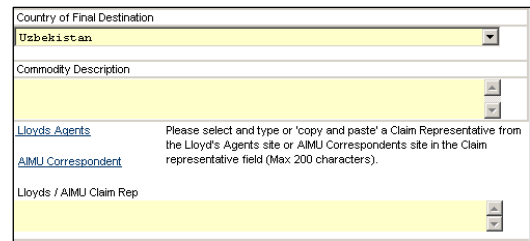


- **Temperature to be maintained at and/or between:** Complete the temperature range information with +/- and temperature amount.

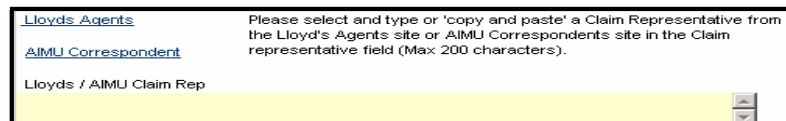
“FPA (Free of Particular Average)” : No additional entry fields are required.


“Manuscript” : Complete a detailed description of the Insuring Condition in the field provided.

Claim Representative:

- **Claim Representative:** The country selected in the **Country of Final Destination** field determines the Claim Representative entry requirements.
 - If the country selected has a Claims Representative, then the name of the adjuster will appear in the drop down menu automatically.
 - If there is more than one adjuster available for the country, “Select Applicable Claims Representative” will display.
 - Select the adjuster you prefer from the drop down menu
 - *Helpful Hint:* perhaps choose an adjuster who is located closest to the destination of the cargo
 - If the country selected has no Claims Representatives, links will display for both the *Lloyds Agents* or the *AIMU Correspondent* Web sites. Use these sites to find the appropriate claim representatives’ names. Enter the names manually or copy onto Notepad then copy into the claim representative field. Refer to [Copying from Note Pad](#) instructions.



 **Note:** If a different claim representative is required other than the defaulted one, they must be an approved Lloyd’s Agent or AIMU Correspondent. The defaulted claim representative will print on the Special Policy and the replacement correspondent information will need to be obtained and contacted by the claimant.

- **Sum Insured:**
 - Amount: Enter the amount of the sum insured. The sum must be entered in #,###.## format using comma for the thousand separator and period as the decimal point, e.g. 21,546.18. The currency symbol in front of the amount will change as the type of currency is selected.
 - Currency Type: From the drop box select the appropriate type of currency.
 - USD = United States Dollar (\$)
 - CAD = Canadian Dollar (Can\$)
 - GBP = Great Britain Pounds (£)
 - EUR = Euros (€)
 - YEN = Yen (¥)
 - HKD = Hong Kong Dollars (HK\$)
 - SGD = Singapore Dollars (S\$)
 - CHF = Swiss Francs (SwF)
- **Sum Insured in Words:** Automatically pre-fills with the alpha translation of the numerical amount entered.

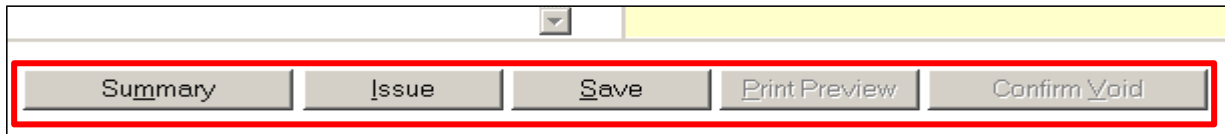
Sum Insured	\$ 10,000.00	USD ▼
Sum Insured in Words		
Ten Thousand		

- **Special Conditions:** Optional Information. A free form text field available to indicate unique shipping conditions. This field is limited to 450 characters.




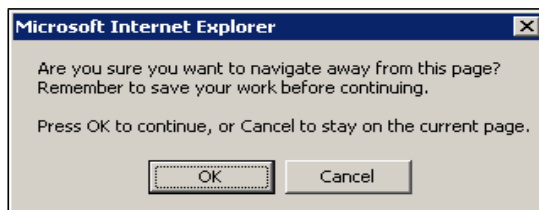
Note: If a required field is left blank a warning message will appear to complete the field. All mandatory fields must be completed prior to issuing the Special Policy.

Process the Cargo Special Policy



After completing the policy information, use the buttons at the bottom of the page to: **Save** the Cargo Special Policy, **Issue** and/or return to the *Special Policy Summary* page. **Print Preview** and **Confirm Void** buttons become available only after saving and/or issuing the policy.

- Click  to return to the *Special Policy Summary* page.



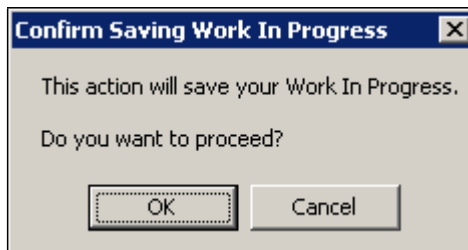
A *Warning* message displays.

- Click **OK** to return to the *Special Policy Summary Page*. Click **Cancel** to return to the Special Policy to first Save it, or to continue working on it.



Warning: If the Cargo Special Policy was not saved first, it will NOT be saved when OK is clicked.

- Click  to save the displayed Cargo Special Policy and issue later.



The *Confirm Saving Work In Progress* message displays.

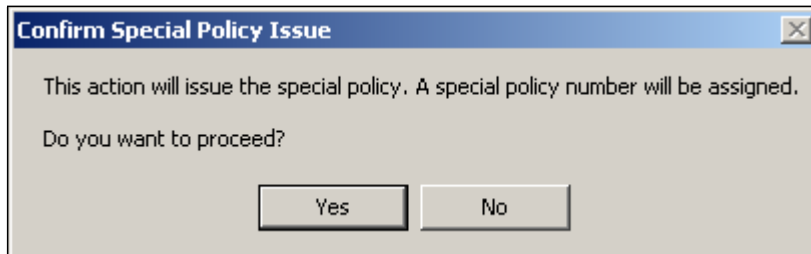
- Click **OK** to save the policy and re-display the *Cargo Special Policy* field entry page. Click **Cancel** to stop the work in progress from being saved and re-display the *Cargo Special Policy* page.



Note: After exiting from the saved pending Cargo Special Policy, re-access the pending Cargo Special Policy by clicking **List Work in Progress** on the *Special Policy Summary* page. See below for more details.

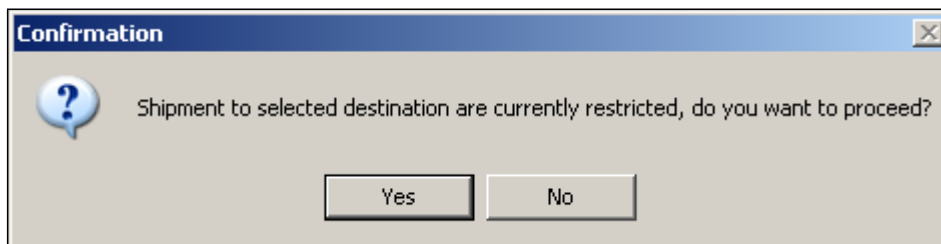
Issue the Cargo Special Policy


- Click to save and issue the Cargo Special Policy.

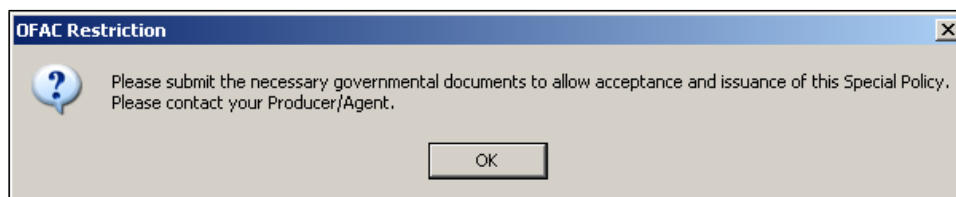


- Click "Yes" to proceed to issue the Cargo Special Policy. Click "No" to return to the *Cargo Special Policy* page without issuing.


OFAC Restrictions



 **Warning:** If a country is selected that has restrictions, a *Confirmation* message displays asking if you wish to proceed with issuing. Click "No" to return to the entry screen and edit the country selected, if necessary. Select "Yes" to continue with the restricted destination.



The *OFAC Restriction* window displays indicating that governmental documents should be submitted for the Cargo Special Policy to be reviewed. Click "OK" to continue.

 **Note:** If the system does not have your e-mail address on file, an E-mail window displays asking you to input your e-mail address. This will be submitted to our company when OK is clicked.

The policy has been sent for review and will now be listed in your *Work in Progress* with a status of "OFAC Pending". Changes cannot be made while the status is OFAC Pending.

Issued Cargo Special Policy

St Paul Fire and Marine Special Policy

Ocean Cargo Policy Number: TSTVSCU001 Date of Shipment (mm/dd/yyyy): 08/13/2006

Special Cargo Policy No: 1

Assured Name US CUSTOM POLICY	Loss, if any, payable to the Assured or order of TEST
City and Country of Origin TEST	City of Final Destination TEST
Exporting/Importing Carrier (Vessel/Airline Carrier) TEST	Country of Final Destination India
Marks and Numbers TEST	Commodity Description TEST
Insuring Condition Refrigerated Shipments with Temperature	Claim Representative

Temperature to be maintained at and/or between 67 °F and 789 °F

Sum Insured \$ 69,786.00 USD	Special Conditions YHBJ
Sum Insured in Words Sixty Nine Thousand Seven Hundred Eighty Six	

Summary
Issue
Save
Print Preview
Confirm Void

After Issuing, the *Cargo Special Policy* field entry page re-displays with the **Special Cargo Policy No** automatically assigned and the fields on this page are now protected.

Click **Summary** to return to the *Special Policy Summary* page. From the *Summary* page, re-access this Cargo Special Policy using **List Issued**.

To review and print a copy of the policy:

- Click Print Preview

Custom Policy

The Custom Cargo Special Policy fields are the same as the Elite Special Policy, with the exception of the **Insuring Condition** field, this field contains a list of the available Insuring Conditions for the policy.

- Click a listed Insuring Condition to view the complete description in the area below or to the right of the **Insuring Condition** field.
- Clicking an Insuring Condition selects it for the policy. The selection will be highlighted in blue.

Note: Only one Insuring Condition can be selected before saving/issuing

European Policy

In the event you have a European policy issued by the London office the screens may look slightly different, but the functionality of the system remains the same.

Above is a sample of the Create screen.



Note: Use the date format dd/mm/yyyy for the **Date of Shipment** field.

Above is an example of the Policy Paper.

Copying from Notepad

The only acceptable applications where text can be copied from and pasted into the Cargo Special Policies application are Notepad. Copy items onto the Notepad first then copy and paste from Notepad into the Cargo Special Policies application.

How to access for Microsoft 2010:

- Start Button lower right screen
- Click on **All Programs**
- Click on **Accessories**
- **Notepad** is an available option in the menu selection that displays