

Special Policy Summary Functions

This Quick Guide addresses how to use the *Special Policy Summary* page to list, re-access and export Special Cargo Policies & Certificates of Insurance, previously issued under the earlier system, within the Ocean Cargo Special Policies system.

1. Special Policy Summary



Previously created Cargo Special Policies and Certificates of Insurance can be accessed from the *Special Policy Summary* page. Click a button to list:

- Work in progress
- Issued policies
- Voided policies

2. Special Policy Lists



The appropriate list displays in a grid in the lower half of the *Special Policy Summary* page.

Note: Use the vertical scrollbar to view all the listed policies. If there are more than 500 policies, use the **Next** button to view the next 500.

All lists include the **Date of Shipment**, **Assured Name**, **Vessel/Air Carrier** and **Sum Insured** for each policy.

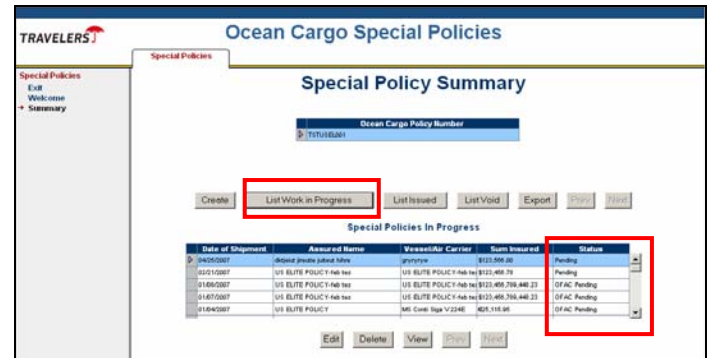
To re-sort a list, double-click a column heading. The default sort order is descending by Date of Shipment (newest to oldest).

If more policies are available for the list, **Prev** and **Next** buttons become available.

Click the grey box to the left of a row to select a listed policy. The policy row becomes highlighted and the appropriate action buttons for the policy become available.

3. List Special Policies in Progress

- From the *Special Policy Summary* page, click **List Work in Progress** to view all Special Cargo Policies in progress.

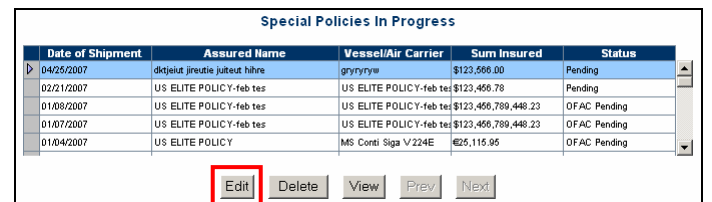


The *Special Policies in Progress* grid displays in the lower section of the screen. The grid displays the *Status* of the work in progress:

- **Pending** – Cargo Special Policy has been created but not yet issued.
- **OFAC Pending** – Cargo Special Policy that is pending further review because of OFAC restrictions.
- **OFAC Approved** – Cargo Special Policy that has been created and the OFAC restrictions have been reviewed. The policy is now available for issuing.

Buttons are available to **Edit**, **Delete** or **View** an in progress policy.

- Click the grey box to the left of a row to select a listed policy. The policy row becomes highlighted.



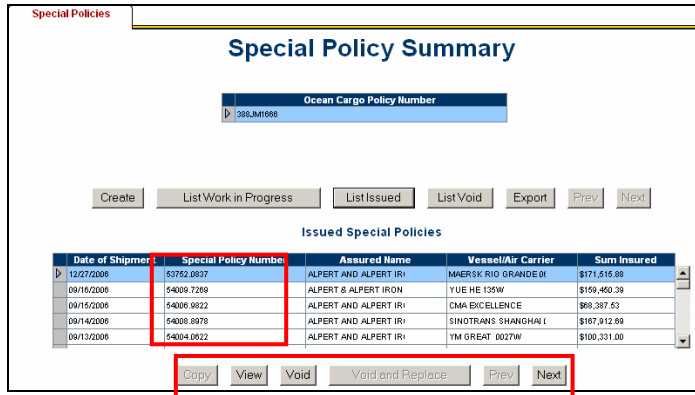
- Click **Edit** to open the *Special Cargo Policy* field entry page to make changes and/or issue the policy.

Note: **Edit** is not available if the policy *Status* is **OFAC Pending**. OFAC Pending policies can only be deleted or viewed.

- Click **Delete** to delete the Cargo Special Policy in progress.
- Click **View** to view the pending Cargo Special Policy.

4. List Issued Special Policies or Certificates of Insurance

- From the *Special Policy Summary* page, click **List Issued** to view all issued Special Cargo Policies.



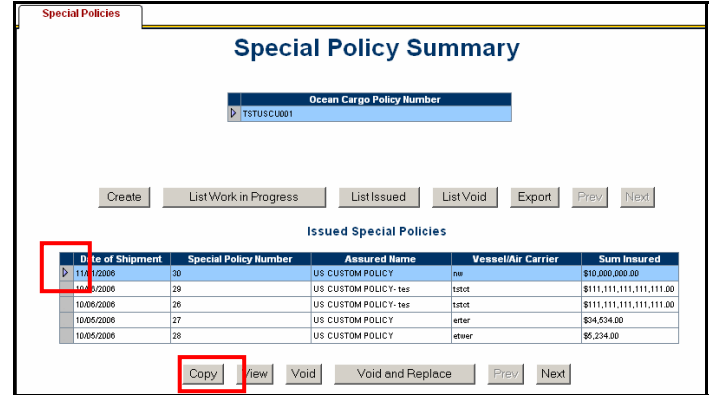
The *Issued Special Policies* grid displays the first 500 issued policies. Special Policy Number is listed on the Issued grid.

Buttons are available to **Copy**, **View**, **Void** or **Void and Replace** an issued policy.

Note: Certificates of Insurance created in the former St. Paul Fire & Marine system may be listed on the Issued list. These are identified with long Special Policy Numbers and the **Copy** and **Void & Replace** buttons are unavailable. These policies can only be viewed and/or voided.

- Click the grey box to the left of a row to select a listed policy. The policy row is highlighted.
- Click **Copy** to create a new Special Policy with information from an existing issued Special Policy. See below for details on copying a policy.
- Click **View** to view and/or print the issued Special Policy.
- Click **Void** to void the issued Special Policy. See below for details on voiding a policy.
- Click **Void and Replace** to void the issued policy but copy the information into a new Cargo Special Policy. The *Cargo Special Policy* field entry page will display allowing the copied policy to be edited and issued.

5. Copy an Issued Special Policy

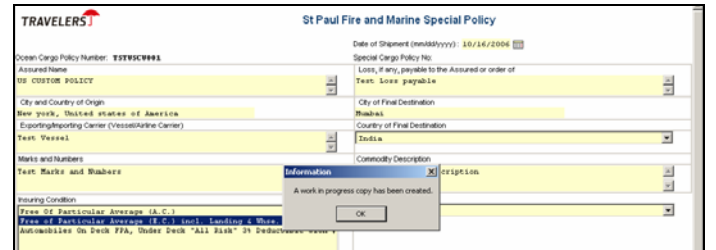


With the *Issued Special Policies* grid displayed on the *Special Policy Summary* page:

- Click the grey box to the left of a row to select the policy to be copied.

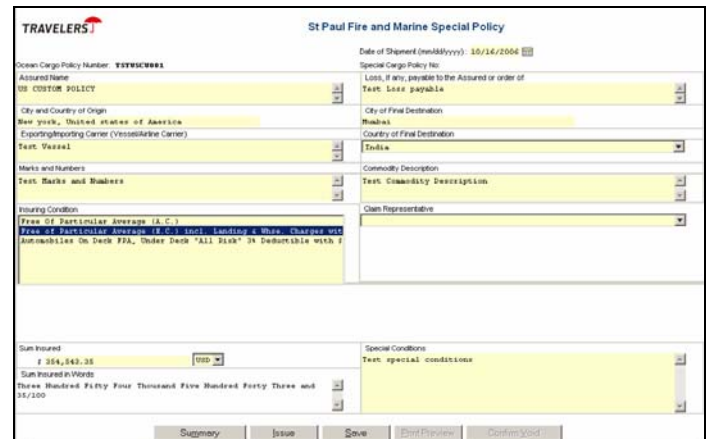
- Click **Copy**.

Note: The **Copy** button will not be available for issued Certificates of Insurance created in the former St. Paul Fire & Marine system.



The *Special Policy* entry field displays. An information window displays indicating that a new Special Policy has been started.

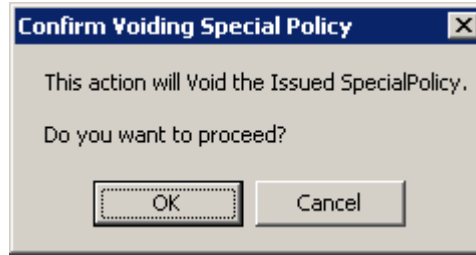
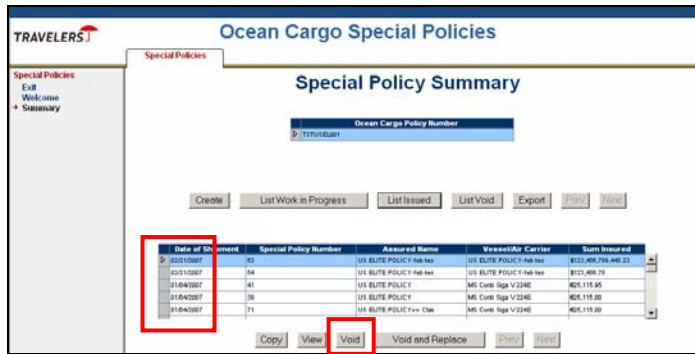
- Click **OK**.



The new Cargo Special Policy is pre-filled with the information from the copied policy. All fields are editable.

When finished, use the buttons to **Issue** or **Save** the new policy.

6. Void an Issued Special Policy or Certificate of Insurance

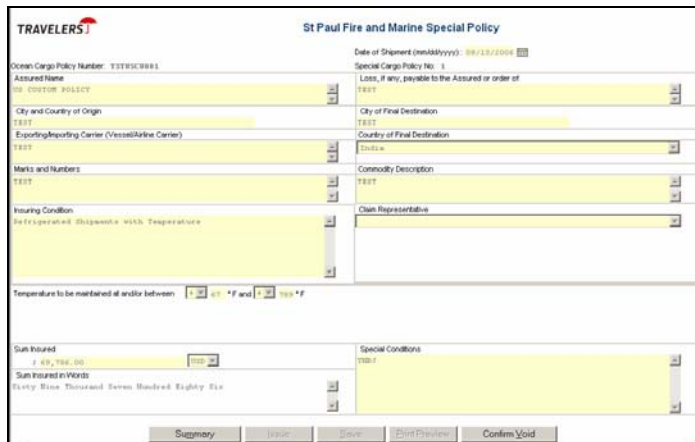


The *Confirm Voiding Special Policy* pop-up window displays.

- Click **OK** to continue the void process, or click **Cancel** to stop the process.

With the *Issued Special Policies* grid displayed on the *Special Policy Summary* page:

- Click the grey box to the left of a row to select a listed policy.
- Click **Void**.



The *Special Cargo Policy* field entry page displays. The fields are protected.

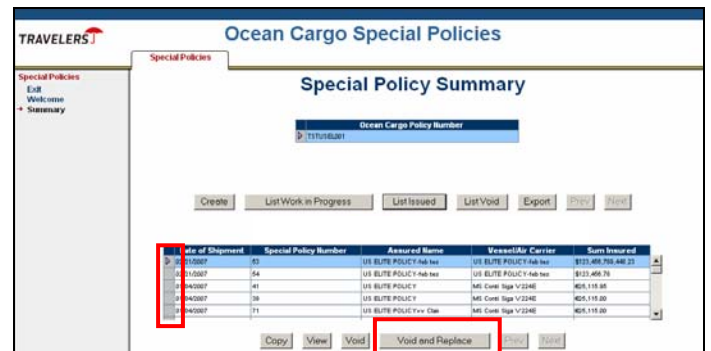
- Click **Confirm Void** to continue the void process.

Note: To cancel the void process, click **Summary**. The *Special Policy Summary* page re-displays and the policy remains in the Issued list.

The *Special Cargo Policy* field entry page re-displays. **Summary** and **Print Preview** are the only options now available.

- Click **Summary** to return to the *Special Cargo Policy Summary* page. The Voided policy will now display in the **List Void** grid.
- Click **Print Preview** to open a new window to view and/or print the voided Cargo Special Policy.

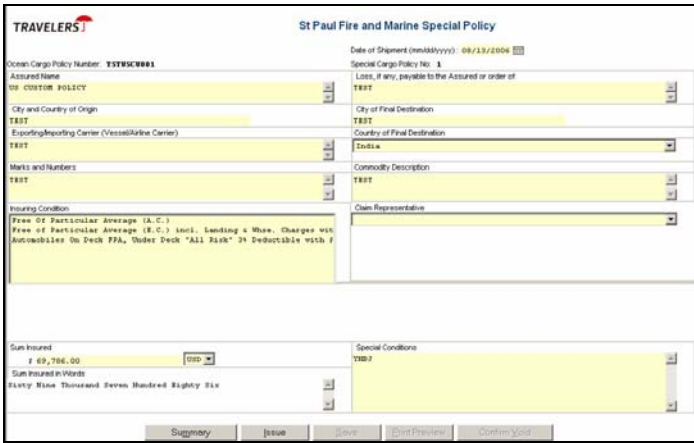
7. Void and Replace an Issued Special Policy



- Click the grey box to the left of a row to select a listed policy.

- Click **Void and Replace**.

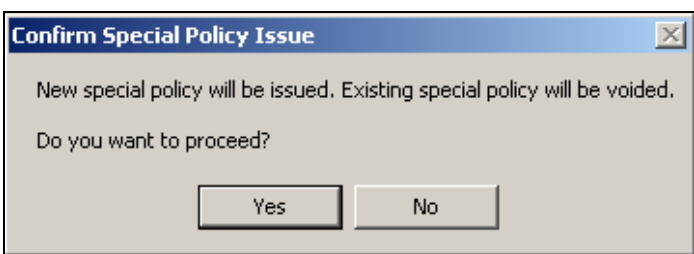
Note: The **Void and Replace** button will not be available for issued Certificates of Insurance created in the former St. Paul Fire & Marine system.



The *Cargo Special Policy* field entry page displays. The information from the voided policy displays and the fields are available for editing.

- Make the changes needed for the replacement Special Policy.
- Click **Issue** to void the previously issued Special Policy and create the updated replacement Special Policy.

Note: To cancel the Void and Replace process, click **Summary**. The *Special Policy Summary* page re-displays and the policy remains in the Issued list



- The following message appears, click **Yes** to continue with the void and replacement process.

The replacement *Special Cargo Policy* field entry page re-displays with the fields protected. Click **Print Preview** to view and/or print the new certificate. Click **Summary** to return to the *Special Policy Summary* page.

8. List Voided Special Policies

- From the *Special Policy Summary* page, click **List Void** to view all voided Special Cargo Policies.



The *Voided Special Policies* grid displays all voided policies.

Buttons are available to **Copy** or **View** a voided policy.

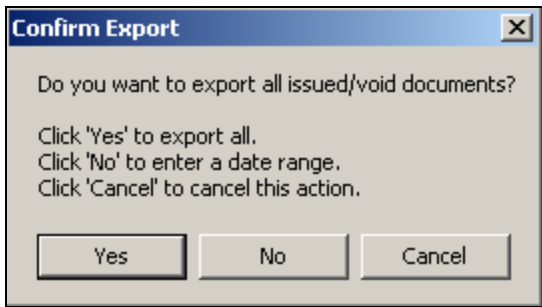
- Click the grey box to the left of a row to select a listed policy. The policy row is highlighted.
- Click **View** to view and then, if necessary, print the selected voided Cargo Special Policies.
- Click **Copy** to copy the information from a voided Special Policy. The *Special Cargo Policy* field entry page displays with the information from the voided policy available to edit and then issue a new certificate.

9. Export Data to Excel



On the *Special Policy Summary* page, data from issued and voided Special Policies can be exported to an Excel spreadsheet. The Excel spreadsheet can then be customized and re-sorted.

- Click **Export**



The *Confirm Export* pop-up window displays.

- Click **Yes** to download all issued/void documents. (Continue to # 11 of this quick guide)
- Click **No** to first enter a shipment date range to export. (Continue to # 10 of this quick guide)
- Click **Cancel** to return to the *Special Policy Summary* page without opening Excel.

10. Export Data to Excel – Enter Date Range

EXPORT FILTER

Policy No: TSTUSCU001

Select the date range by clicking on calendar icon

Date of Shipment **From:** **To:**
(mm/dd/yyyy)

Summary Export

If **No** was selected on the *Confirm Export* window (above), the *Export Filter* page displays allowing the user to narrow the number of items to export.

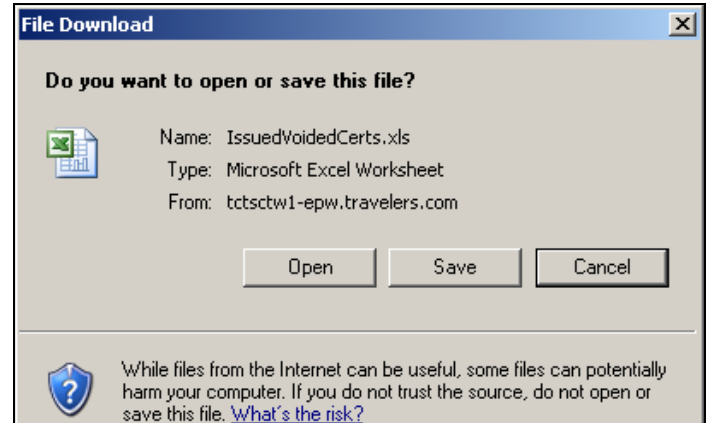
- **Date of Shipment:** Enter **From** and **To** dates in mm/dd/yyyy format – or click the icon to select dates.

Note: For European policies enter the date in dd/mm/yyyy format.

- Click **Export**.

Note: To cancel the Export, click **Summary**. The *Special Policy Summary* page re-displays.

11. Download Excel File



The *File Download* window may display.

- Click **Open** to open the Excel spreadsheet.
- Click **Save** to save the Excel spreadsheet to your computer.
- Click **Cancel** to return to the *Special Policy Summary* page without opening Excel.

3	Status	Date of Shipment	Special Policy Number	Date	Description of Goods Shipped	Sum Insured	Deductible (as per Oc
4	Issued	08/08/2006	5	08/09/2006	Novelty Items	500,000.00	\$1,000
5	Void	08/08/2006	4	08/09/2006	Novelty Items	500,000.00	\$1,000
6	Void	08/10/2006	3	08/09/2006	Furniture	200,000.00	\$500
7	Void	08/10/2006	2	08/09/2006	Novelty Items	500,000.00	\$1,000
8	Issued	08/03/2006	1	08/09/2006	Novelty Items	500,000.00	\$1,000

The Excel spreadsheet displays in a new window.