

## 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.

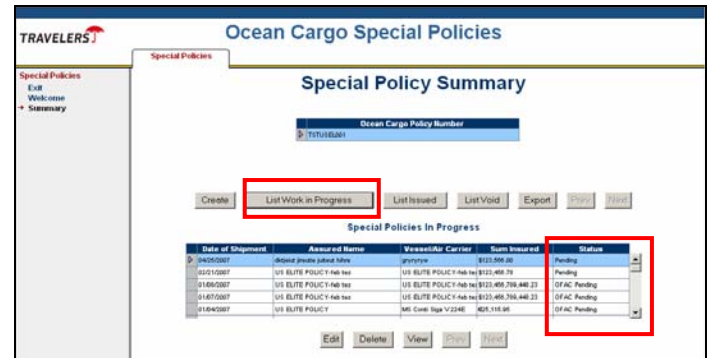
To re-sort a list, double-click a column heading. The default sort order is descending by Date of Shipment (newest to oldest).

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.

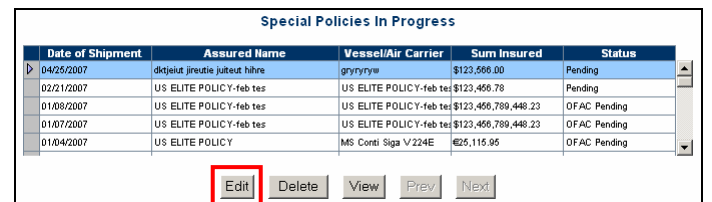


The *Special Policies in Progress* grid displays in the lower section of the screen. The grid displays the *Status* of the work in progress:

- **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.

**Special Policy Summary**

Ocean Cargo Policy Number: 000,000,000

Buttons: Create, List Work in Progress, List Issued, List Void, Export, Prev, Next

Date of Shipment	Special Policy Number	Assured Name	Vessel/Air Carrier	Sum Insured
12/07/2006	52752.0927	ALPERT AND ALPERT IRI	MERCK RIO GRANDE OI	\$171,515.00
09/16/2006	54006.7269	ALPERT & ALPERT IRON	YUE HE 135W	\$159,450.39
09/15/2006	54006.9822	ALPERT AND ALPERT IRI	CMA EXCELLENCE	\$68,397.53
09/14/2006	54006.9978	ALPERT AND ALPERT IRI	SINOTRANS SHANGHAI	\$167,812.69
09/13/2006	54004.0922	ALPERT AND ALPERT IRI	YM GREAT 0027W	\$100,331.00

Buttons: Copy, View, Void, Void and Replace, Prev, Next

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

**Special Policy Summary**

Ocean Cargo Policy Number: 1STUSCU001

Buttons: Create, List Work in Progress, List Issued, List Void, Export, Prev, Next

**Issued Special Policies**

Date of Shipment	Special Policy Number	Assured Name	Vessel/Air Carrier	Sum Insured
10/14/2006	10	US CUSTOM POLICY	tes	\$10,000,000.00
10/06/2006	26	US CUSTOM POLICY-tes	test	\$111,111,111,111,111.00
10/06/2006	26	US CUSTOM POLICY-tes	test	\$111,111,111,111,111.00
10/05/2006	27	US CUSTOM POLICY	eter	\$34,534.00
10/05/2006	28	US CUSTOM POLICY	eter	\$5,234.00

Buttons: Copy, View, Void, Void and Replace, Prev, Next

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.

**St Paul Fire and Marine Special Policy**

Ocean Cargo Policy Number: 1STUSCU001

Date of Shipment (mm/dd/yyyy): 10/14/2006

Special Cargo Policy No.:

Assured Name: US CUSTOM POLICY

Loss, if any, payable to the Assured or order of:

Test: Loss payable

City and Country of Origin: New York, United States of America

City of Final Destination:

Exporting/Reporting Center (Vessel/Airline Carrier):

Country of Final Destination:

Test: Vessel:

Test: Marks and Numbers:

Commodity Description:

Insurance Condition:

Test: Marks and Numbers:

Information: A work in progress copy has been created.

OK

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

- Click **OK**.

**St Paul Fire and Marine Special Policy**

Ocean Cargo Policy Number: 1STUSCU001

Date of Shipment (mm/dd/yyyy): 10/14/2006

Special Cargo Policy No.:

Assured Name: US CUSTOM POLICY

Loss, if any, payable to the Assured or order of:

Test: Loss payable

City and Country of Origin: New York, United States of America

City of Final Destination:

Exporting/Reporting Center (Vessel/Airline Carrier):

Country of Final Destination:

Test: Vessel:

Test: Marks and Numbers:

Commodity Description:

Test: Marks and Numbers:

Test: Commodity Description:

Insurance Condition:

Test: Marks and Numbers:

Claim Representative:

Sum Insured: \$ 354,442.38 USD

Special Conditions: Test special conditions

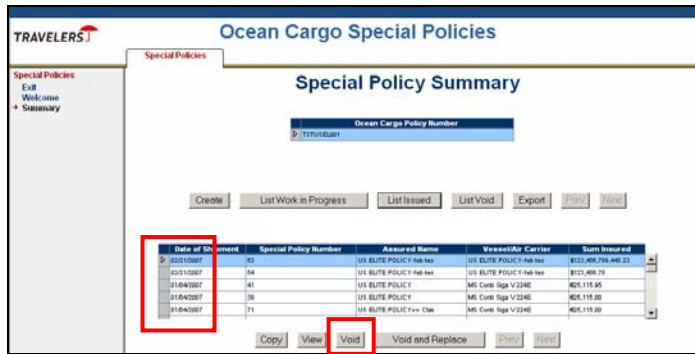
Sum Insured in Words: Three Hundred Fifty Four Thousand Five Hundred Forty Three and 38/100

Buttons: Summary, Issue, Save, Edit Preview, Confirm/Close

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

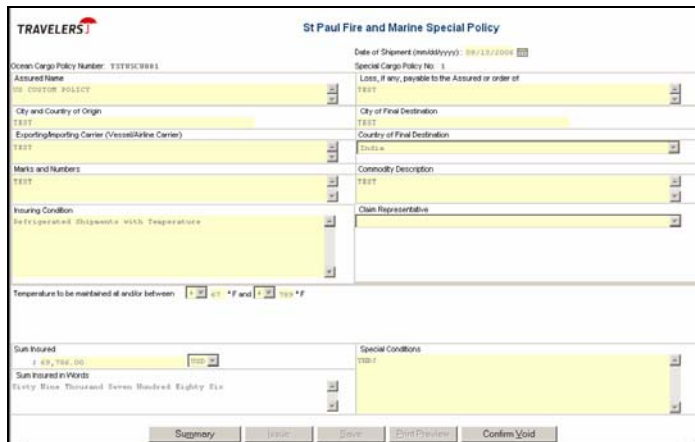
When finished, use the buttons to **Issue** or **Save** the new policy.

## 6. Void an Issued Special Policy or Certificate of Insurance



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

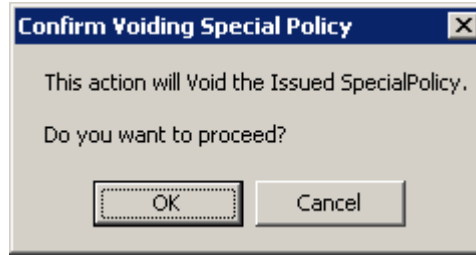
- Click the grey box to the left of a row to select a listed policy.
- Click **Void**.



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.



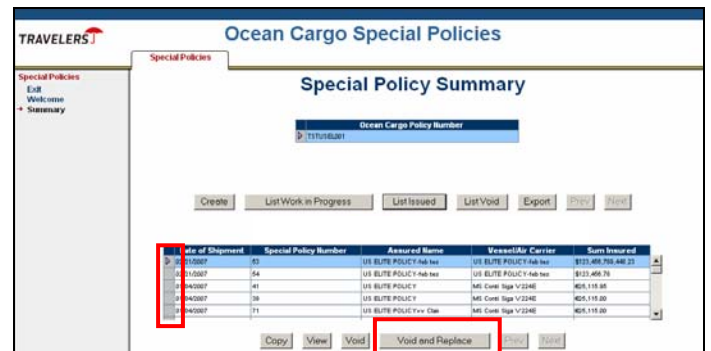
The *Confirm Voiding Special Policy* pop-up window displays.

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

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.

Date of Shipment	Special Policy Number	Assured Name	Vessel/Air Carrier	Sum Insured
11/02/2006	20	US ELITE POLICY	General	\$2,250,000.00
10/11/2006	13	US ELITE POLICY	General	\$100,000.00
10/11/2006	20	US ELITE POLICY	General	\$62,115.00
10/20/2006	24	US ELITE POLICY	General	\$21,424,124.00

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

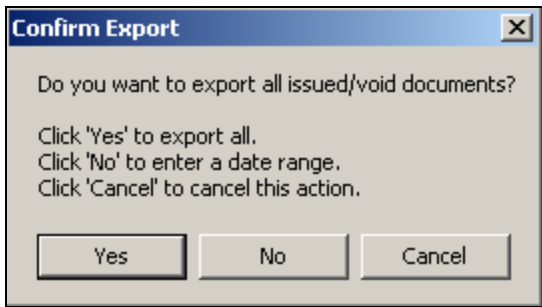
Buttons are available to **Copy** or **View** a voided policy.

- 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.

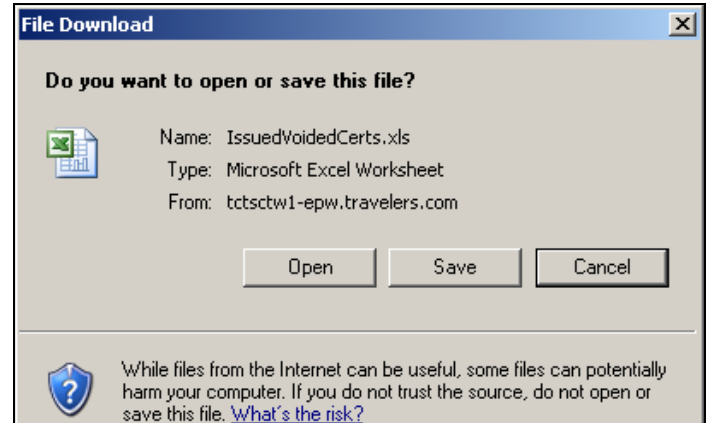
- **Date of Shipment:** Enter **From** and **To** dates in mm/dd/yyyy format – or click the  icon to select dates.

**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.