

# 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.

## Special Policy Summary



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

- Work in progress
- Issued policies
- Voided policies

## Special Policy Lists

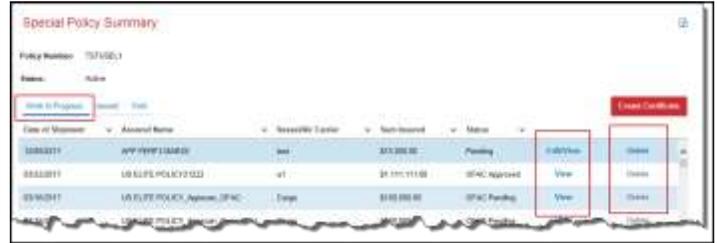


The appropriate list displays in a grid on the lower half of the *Special Policy Summary* page. Use the vertical scrollbar to view all the listed policies.

All lists include the **Date of Shipment**, **Special Policy No.** (only displayed for Issued and Void lists), **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).

## Work in Progress



*Special Policy Summary* page, click **Work in Progress** (defaults to this view) 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.
- **OFAC Declined** - Cargo Special Policy that has been created and the OFAC restrictions have been reviewed. The policy will not be able to be issued.

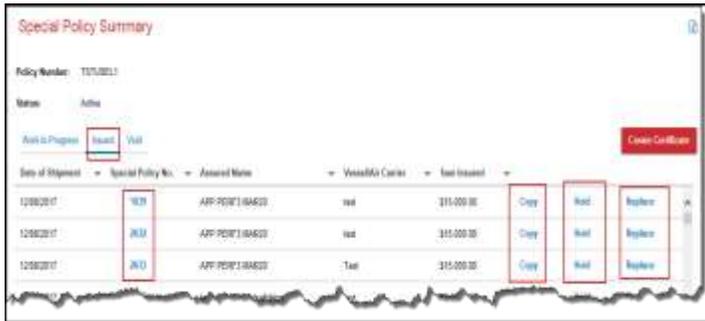
Links are available to **Edit/View**, **Delete** or **View** an in progress policy.

- Click **“Edit/View”** to open the *Create Certificate* page to make changes and/or issue the policy.
- Click **“Delete”** to delete the Cargo Special Policy in progress.

**Note:** **Edit** and **Delete** are not available if the policy **Status** is **OFAC Pending**.

- Click **“View”** to view the pending Cargo Special Policy for OFAC Approved, OFAC Pending, or OFAC Declined.

## List Issued Special Policies or Certificates of Insurance



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

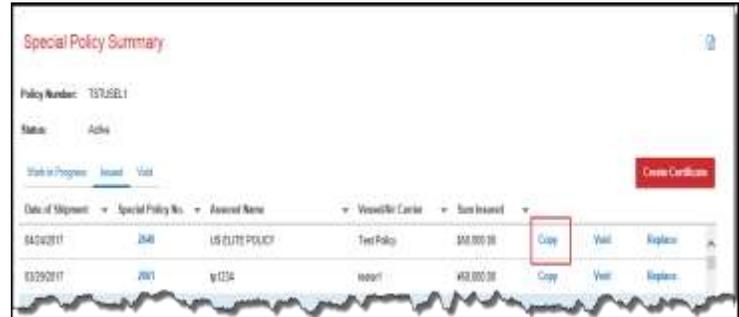
Links are available to **Copy**, **Void** or **Replace** an issued policy.

To view a special policy click the **Special Policy No.**

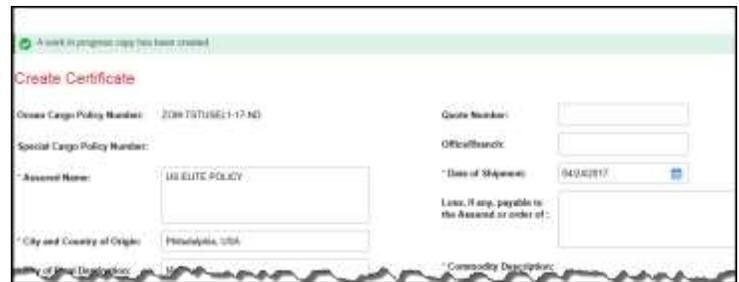
**Note:** Certificates of Insurance created in the former St. Paul Fire & Marine system may be listed on the Issued list. These are identified with long Special Policy Numbers and the **Copy** and **Void & Replace** buttons are unavailable. These policies can only be viewed and/or voided.

- Click **“Copy”** to create a new Special Policy with information from an existing issued Special Policy. See below for details on copying a policy.
- Click **“Void”** to void the issued Special Policy. See below for details on voiding a policy.
- Click **“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.

## Copy an Issued Special Policy



➤ Click: **“Copy”**



The *Create Certificate* page displays and fields are editable. An information message displays in green indicating “A work in progress copy has been created”.

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

When finished, click **Issue** or **Save** at the bottom of the page.

## Void an Issued Special Policy or Certificate of Insurance



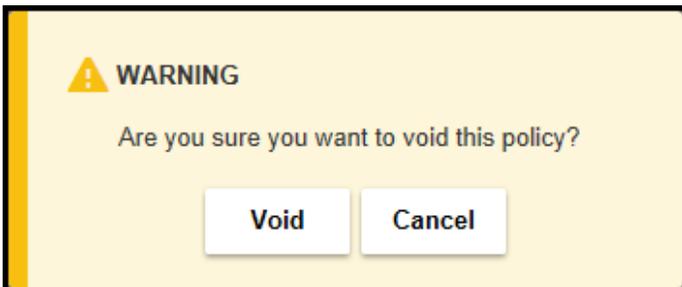
➤ Click **“Void”**.



The *Void* page displays. The fields are protected.

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

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



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

➤ Click **“Void”** to continue the void process  
 ➤ Click **“Cancel”** to stop the process.

The page redisplay as a *View* page field entry page redisplay. **Back** and **Print Preview** are the only options available.



➤ Click **“Back”** to return to the *Special Cargo Policy Summary* page. The Voided policy will display in the **Void** list.

➤ Click **“Print Preview”** to open a new window to view and/or print the voided Cargo Special Policy

**Note:** Printing from the Firefox Browser will require the “Shrink to fit Page Width” selection in the Page set up option.

## Void and Replace an Issued Special Policy



➤ Click **Replace**

The *Create Certificate* field entry page displays. The information from the Original 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.
- Confirmation Message displays

- Click **“Yes”** to continue with the void and replacement process.
- Click **“No”** to return to the *Create Certificate* page

When **“Yes”** is clicked the *View* page displays with the fields protected. Click **Print Preview** to view and/or print the new certificate. Click **Back** to return to the *Special Policy Summary* page.

## List Voided Special Policies

Date of Issuance	Special Policy No.	Account Name	Specialty Code	Sum Insured	Status
12/08/2011	APP PERM'S MARCO	per		\$75,000.00	Issued
06/08/2011	US AUTO POLICY - AP	Traveling Policy		\$50,000.00	Voided
06/08/2011	US AUTO POLICY - AP	Traveling Policy		\$75,000.00	Voided
06/08/2011	TRAVELERS POLICY	Travelers		\$7,500.00	Voided

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

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

Links are available to **Copy** or **View the Special Policy No.**

- Click the **“Special Policy No.”** 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 *Create Certificate* page displays with the information from the voided policy available to edit and then issue a new certificate.

## 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

The *Confirmation* Message displays.

