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.
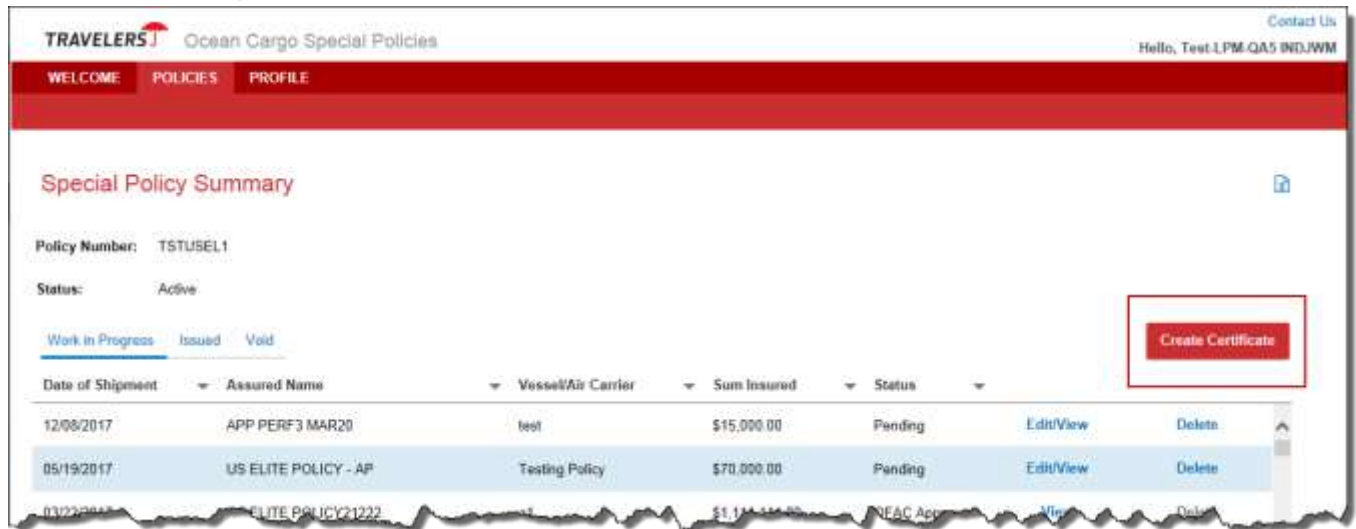
Specifically, you will learn how to:

➢ 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

TRAVELERS

Table of Contents

The *Table of Contents* is an active table. Click a topic to be taken directly to the topic within this document.
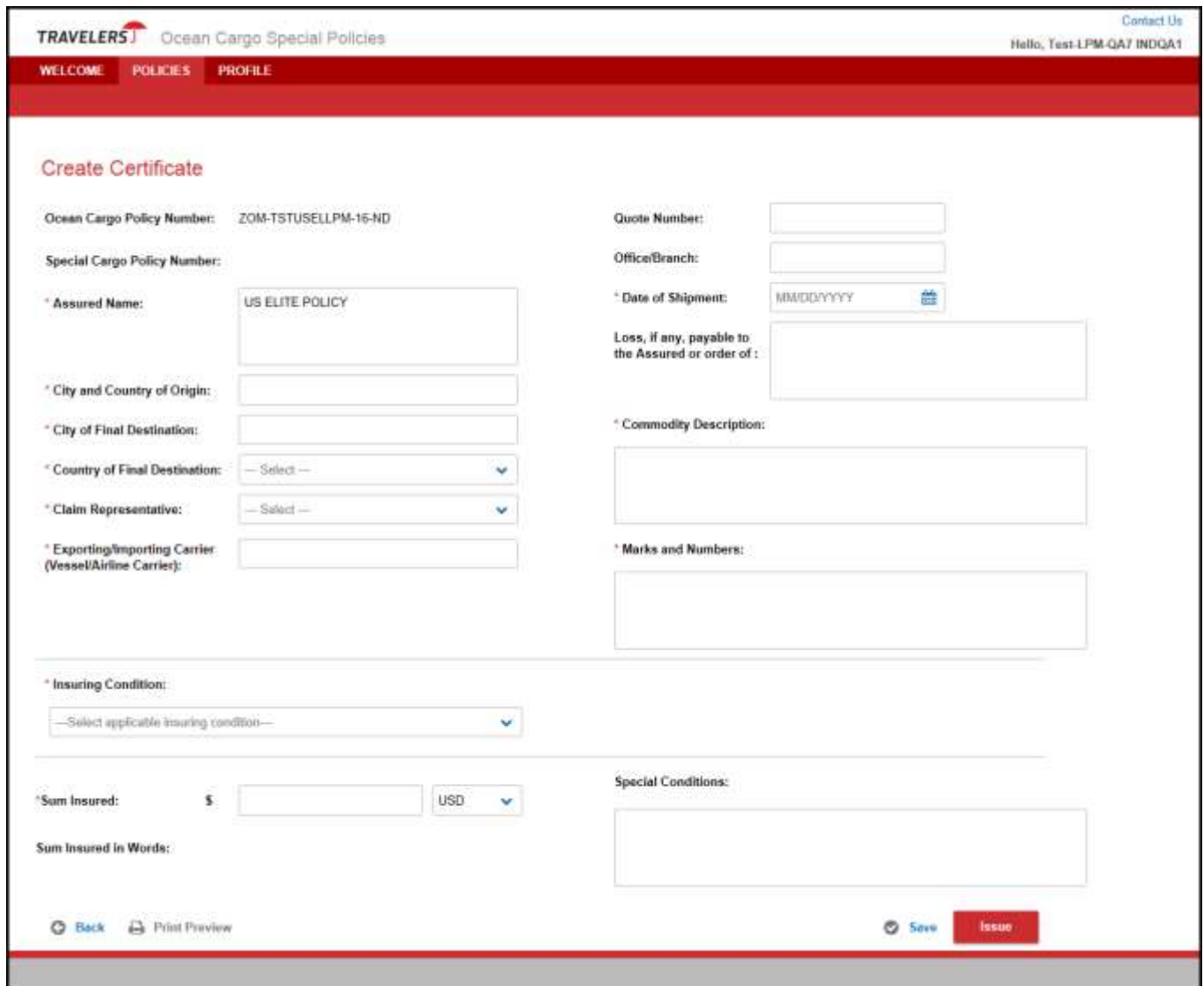
Create a Cargo Special Policy

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.

To begin creating a Special Cargo Policy from the *Special Policy Summary* page click **Create Certification.**

☞ **Note:** If the **Create Certificate** 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.

The *Special Cargo Policy* entry field page displays. Complete fields on this page by tabbing through the form. Subsequent fields on this page are displayed/hidden and required/not required, depending on the selection made in specific **Insuring Condition** fields. 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.

- ➢ **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.
- ➢ **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.
- ➢ **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.

- ➢ **Claim Representative:** The country selected in the **Country of Final Destination** field determines the "Claim Representative" field entry requirements. Refer to Claim Representative Details
- ➢ **Exporting/Importing Carrier (Vessel/Airline Carrier):** Enter a detailed description of the shipping conveyance.
- ➢ **Quote Number:** not required entry
- ➢ **Office Branch:** not required entry
- ➢ **Date of Shipment:** Enter the date of the Shipment in mm/dd/yyyy format
  - o 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.

- ➢ **Loss, if any, payable to the Assured or order of:** Enter Loss Payee Name(s) if applicable
- ➢ **Commodity Description:** Enter a detailed description of the goods being shipped.
- ➢ **Marks and Numbers:** Enter container, seal or carton numbers, or any other similar shipping identification number. This field is limited to 550 characters.
- ➢ **Insuring Condition:** Use the drop down list to select an applicable insuring condition.
  Valid entries include the following (Refer to Insuring Conditions Details for entry details)
  - o All Risk
  - o Refrigerated Shipments
  - o Refrigerated Shipments with Temperature
  - o FPA (Free of Particular Average)
- ➢ **Sum Insured:**
  - o **Amount:** Enter the amount of the sum insured. The sum must be entered in #, ###. ## 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.
  - o **Currency Type:** From the drop box select the appropriate type of currency. Types:
    - 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)
    - AUD = Australia Dollar (AU$)
    - CNY = China (¥)
    - BRL = Brazil Real (R$)
    - RUB = Russia Ruble (py6)
- ➢ **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.

Once entry is complete proceed to Process the Cargo Special Policy

Insuring Conditions Details

All Risk
 • **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 to be entered in the description box displayed.
 • **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.
	Insuring Condition: All Risk *Claims for* ___ *shall be subject to a deductible of $:* ___ *per:* ___
	
	 ✍ **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.
	
	 ✍ **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.

Refrigerated Shipments • No additional entry fields are required	* Insuring Condition: Refrigerated Shipments
Refrigerated Shipments with Temperature • **Temperature to be maintained at and/or between:** Complete the temperature range information with +/- and temperature amount	* Insuring Condition: Refrigerated Shipments with Temperature Temperature to be maintained at and/or between: ° ___ °F and ° ___ °F
FPA (Free of Particular Average • No additional entry fields are required	* Insuring Condition: FPA

Claim Representative Details

The country selected in the **Country of Final Destination** field determines the Claim Representative entry requirements.
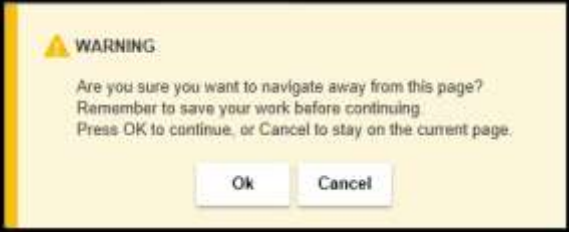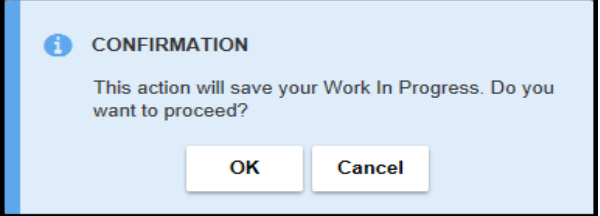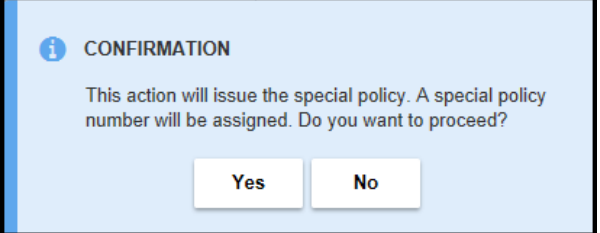
If the country selected has a Claims Representative, then the name of the adjuster will appear in the drop down menu automatically.	* Country of Final Destination: United Kingdom of Great Britain and Northe ▼ * Claim Representative: --WK Webster ▼
If there is more than one adjuster available for the 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	* Country of Final Destination: Spain ▼ * Claim Representative: | ▼ Barcelona --MacAndrews, S.A. Cadiz --G&J MacPherson SL Madrid --MacAndrews, S.A.
If the country selected has no Claims Representatives, links will display for both the *LloydsAgents* and 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 Lloyds/AIMU Claim Rep field	* Country of Final Destination: Uzbekistan ▼ ⓘ Lloyds Agents / AIMU Correspondent — Please select and type or copy and paste a Claim Representative from the Lloyd's Agents site or AIMU Correspondents site in the Claim representative field (Max 300 characters). *Lloyds / AIMU Claim Rep : [ ]

☞ **Note:** If a different claim representative is required other than the defaulted or listed 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.
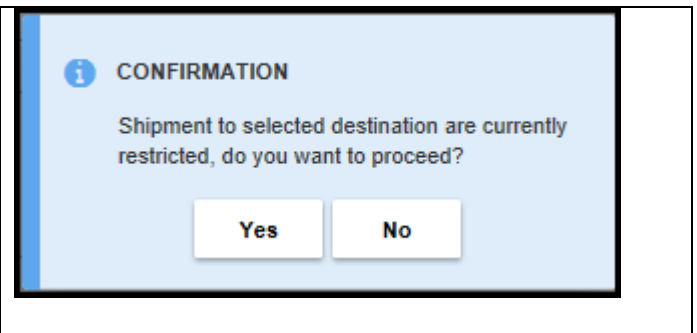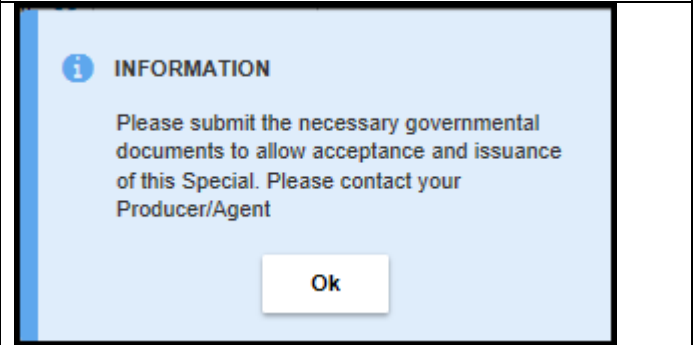
Process the Cargo Special Policy

After completing the policy information, use the buttons at the bottom of the page to: "**Save"** or "**Issue"**.

"**Print Preview"** becomes available only after issuing the policy.

← Back 🖶 Print Preview	✓ Save	**Issue**

If "**Back**" is clicked a Warning Message displays: • Click "**OK"** to return to the *Special Policy Summary* page. • Click "**Cancel"** to stay on the *Create Certificate* page 💣 **Warning: If the Cargo Special Policy was not saved first, it will NOT be saved when "OK" is clicked.**	⚠ WARNING Are you sure you want to navigate away from this page? Remember to save your work before continuing. Press OK to continue, or Cancel to stay on the current page. [Ok] [Cancel]

If "**Save**" is clicked a Confirmation Message displays:
• Click "**OK"** to save the policy and re-display the *Create Certificate* page.
   o If additional changes are made the Certificate will need to be saved again or issued to retain the changes.
• 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.
	ℹ CONFIRMATION
	This action will save your Work In Progress. Do you want to proceed?
	[OK] [Cancel]

If "**Issue**" is clicked a Confirmation Message displays: • Click "**Yes"** to proceed to issue the Cargo Special Policy. • Click "**No**" to return to the Cargo Special Policy page without issuing.	ℹ CONFIRMATION This action will issue the special policy. A special policy number will be assigned. Do you want to proceed? [Yes] [No]

OFAC Restrictions

If "**Issue**". is clicked and there are OFAC restrictions a Confirmation Message displays : • Click "**Yes"** continue with the restricted destination • Click "**No**" to return to the entry screen and edit the country selected, if necessary.	**① CONFIRMATION** Shipment to selected destination are currently restricted, do you want to proceed? [Yes] [No]
If "**Yes"**, is selected the Information Message displays indicating that governmental documents should be submitted for the Cargo Special Policy to be reviewed. Click "**Ok**" to continue. The policy has been sent for review and will now be listed under *Work in Progress* on the *Special Policy Summary page* with a status of "OFAC Pending". Changes cannot be made while the status is OFAC Pending.	**① INFORMATION** Please submit the necessary governmental documents to allow acceptance and issuance of this Special. Please contact your Producer/Agent [Ok]

Issued Cargo Special Policy

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

Click "**Back"** to return to the *Special Policy Summary* page. From the *Summary* page, re-access this Cargo Special Policy by clicking "Issued" to see a list of issued Cargo Special Policies.

Click "**Print Preview"** to print the Cargo Special policy. Refer to Print Preview - Special Cargo Policy section for more information.

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

![Travelers logo]

Print Preview - Special Cargo Policy

Special Cargo Policy displays in a separate window.

- ➢ Using the scroll bar scroll to review the Special Cargo Policy
- ➢ Hover at the bottom of page 1 or 2 to have the Adobe Tool Bar display where you can Save and/or Print the Special Cargo Policy
- ➢ Click the "X" to close the print window and return to the protected *Special Cargo Policy* View page

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

Custom Policy

> ➢ Click the Insuring Condition to view a complete description and/or select the Insuring Condition

> ✍ **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 Ocean Cargo Special Policy screens may look slightly different, but the functionality of the system remains the same.

Above is a sample of the Create screen for a European policy.

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