## 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

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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

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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.

Service 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

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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

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#### Click: "Copy"

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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".

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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.

Are you	NG sure you war	nt to void this	policy?
	Void	Cancel	

The Confirm Voiding Special Policy pop-up window displays.

- Click "Void" to continue the void process
- Click "Cancel" to stop the process.

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

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- 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

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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**

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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

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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.



The Confirmation Message displays.

- Click Export all to download all issued/void documents.
- Click Export date range to first enter a shipment date range to export.
- Click "X" in upper right hand corner to Cancel and return to the Special Policy Summary page without opening Excel.

# Export Data to Excel – Enter Date Range

Policy Number	TSTUSEL1		
Issue From:		To:	MM/DD/YYYY

If **Export date range** is selected the *Export Filter* page displays allowing the user to narrow the number of items to export.

- Date of Shipment: Enter Issue 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 **Cancel**. The Special Policy Summary page re-displays.

#### **Download Excel File**

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The File Download window displays.

- Click Open to open the Excel spreadsheet. When "Open" is selected a Microsoft Excel message displays. Click "Yes" to open.
- Click Save to save the Excel spreadsheet to your computer.
- Click Cancel to return to the Special Policy Summary page without opening Excel.

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The Excel spreadsheet displays in a new window.

#### Printing from a Firefox Browser

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