

INLAND MARINE INTAKE FORM- TO ADD TO POLICY

Enter Email	Enter Your Email
click next	
Submitted to add to policy	Choose "add to policy"
click next	

GENERAL INFORMATION

SCREEN FIELD NAME	INSRUCTIONS
REPORTED DATE	Will default to current date
ASSET TYPE	Default to Inland Marine - do not change!
ASSET CODE	There are 4 choices-choose the one that most closely fits the item being entered (farm and construction equipment are classified as "Contractors" equipment. If nothing else fits, choose "Miscellaneous Equipment"
ASSET NAME	Please use the Asset's Serial number as the name
ASSET DESCRIPTION	Please be descriptive
FUND NUMBER	Enter a valid chart and fund number (X-XXXXXX) which is where the insurance will be billed
OSU ASSET NUMBER	enter the OSU asset number assigned by Asset Management if known
REPORTER EMAIL	Will default to the email entered earlier
SPECIAL ATTACHED EQUIPMENT	If you are purchasing a piece of equipment that is separable (for example a tractor with a loader) put the make and model of the loader here. If more than one attachment, list each with their cost

SCREEN FIELD NAME	INSRUCTIONS
YEAR	Enter the year of manufacture
MAKE	Who made the asset? What BRAND is the asset
MODEL	Enter full model number
SERIAL NUMBER	Enter the complete serial number - please double check accuracy, an incorrect number will not allow any insurance to be paid!
NOTES	
OWNERSHIP	If OSU owns the asset, choose owned. If the asset is loaned to OSU, choose Managed. If OSU is leasing the asset, choose leased.
	If the asset is owned, the next field is "purchased From"
	if asset is managed or leased, the next field is Lessor
PURCHASED FROM /LESSOR	Who did we purchase the item from, or who are we borrowing or leasing from
STATUS	Default to Active-Please do not change

INSURANCE

PURCHASE PRICE	Enter the purchase price of the main piece of equipment only here (NUMBERS ONLY)	INSURED DATE	Enter the date of the submission
VALUE OF ATTACHED EQUIPMENT	Enter the purchase price of the attachment(s) only here (NUMBERS ONLY)	DISPOSAL DATE	this will be non-enterable when adding the asset
Total value	This field should default the total of "Value of attached Equipment" and purchase price. It will not be shown.		

DEPARTMENT INFORMATION

DEPARTMENT	Enter the official department name	CONTACT PHONE	enter the DEPT CONTACT phone number
DEPT CONTACT	enter the person in charge of the asset	ASSET CUSTODIAN NUMBER	enter the Departments custodian number

LOCATION

HEIRARCHY	Choose the campus that the equipment belongs to	CONSTRUCTION TYPE	choose the closest construction type for the building where stored, if appropriate
PROPERTY	enter the closest building to where the asset is normally stored	SPRINKERS	choose whether or not the building has sprinklers
LOCATION	enter the room number, or descriptive information about where the asset normally is	ALARM	note the type of alarms in the building or area where the item is stored

Section Header

Required Field

INLAND MARINE INTAKE FORM- TO REMOVE FROM POLICY

Enter Email	Enter Email
click next	
Submitted to add to policy	Choose "remove from policy"
click next	
Asset Name	add the name of the asset you are removing- either the full name, or you can enter part of the name, then click on the "Search Related Assets" button.
	When search comes up, check the serial number if multiple assets are listed, and use the selection button to choose the asset you want to remove.
click next	
	The general information screen will come up, with all fields populated. Compare the information presented to insure you are selecting the correct asset for deletion. If this is not the correct asset, back out of the intake and start over! Things to compare - the fund number, department, and custodian number should match your specific asset. Remember, there may be more than one of the same type of asset, and the serial number is the best way to check!
click next if everything is correct	
click finish	
You are now done, See "The Rest of the Process" below!	

The Rest of the Process

After the intake is completed, Risk Management will be notified of the change. We will review the asset created (or removed from the policy) and complete any items necessary. A form is then generated and sent to the initiator via Adobe Sign for signature. . When the initiator signs the adobe agreement, the form is returned to Risk Management for counter-signature, then transmitted to the insurer.

Remember, the asset

is not insured, or removed, until we receive the signed forms back for transmittal.