

## INLAND MARINE INTAKE FORM- TO ADD TO POLICY

Screen Field Name

Instruction

Enter Email  
click next  
Submitted to add to policy  
click next

Enter Email  
  
Choose "add to policy"

Reported Date	Will default to current date
reporter email	Will default to the email entered earlier
Asset Name	Name the asset; Be descriptive, so someone can easily find it. As an example, if entering an apple MacBook Air, use MacBook Air with the size
Asset Type	Will default to Inland Marine - please leave as Inland Marine
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"
Serial Number	Enter the complete serial number - please double check accuracy, an incorrect number will not allow any insurance to be paid!
Year	Year of manufacture
Make	Who made the asset?
Model	Enter full model number
Notes	Please put the building and room number where the asset is located
Fund Number	Enter a valid chart and fund number (X-XXXXXX) which is where the
Department Contact	Must be an employee -enter the name of the person who will be in
Asset Custodian Number	Enter the departmental asset custodian number
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
Value of attached Equipment	Enter the value of the attachment only here
Purchase Price	Enter the purchase price of the main piece of equipment only here

### Second Column

Hierarchy	Choose the campus that the equipment belongs to
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	Who did we purchase the equipment from
if asset is managed or leased, the next field is Lessor	who leases OSU, or Loaned OSU, the Asset
Department	Enter your department name
Total Value	This field should default the total of "Value of attached Equipment" and purchase price. It will not be shown.
Insured Date	Add the date you want insurance to begin
Disposal Date	Ignore this
Status	Will default to active

click next

"Please upload and attach any photos, files, invoices, etc that will ..."

upload or drop files

Please add any files that will document the asset - photos, invoices, etc.

click "Finish"

You are done! See "The Rest of the Process below!"

Click "Finish"

**INLAND MARINE INTAKE FORM- TO REMOVE FROM POLICY**

Screen Field Name	Instruction
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.**