A decorative graphic on the left side of the page, composed of a grid of squares in various shades of blue, arranged in a stepped pattern that ascends from left to right.

NavRisk

Client User Manual

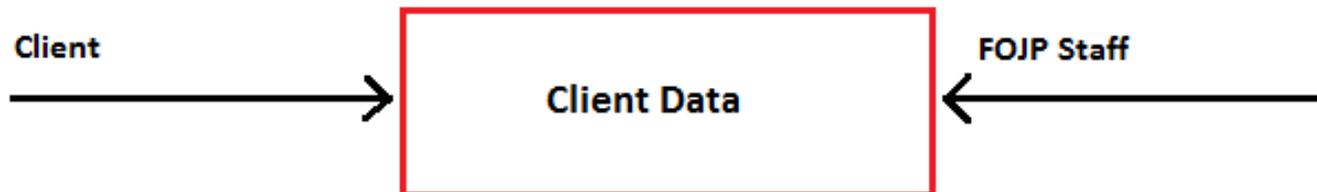
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The NavRisk Portal will run under any browser that is capable of hosting the Silverlight runtime. Examples of supported browsers include Microsoft Internet Explorer versions 8 and 9.

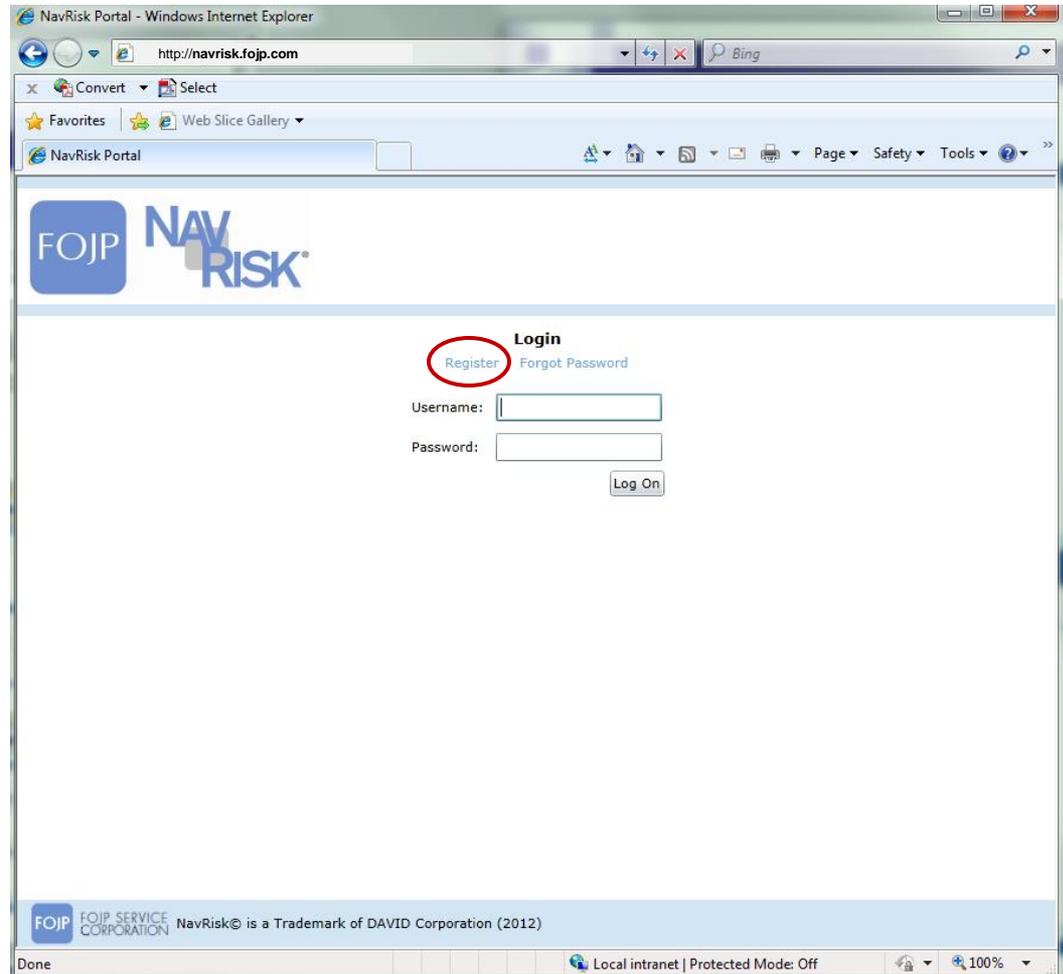
Introduction

- NavRisk is the software program customized by FOJP to house, manage and display all data needed for insurance policy application quotes, endorsements and renewals.
 - The data is located at FOJP.
- Clients have access to the data by logging onto their NavRisk Portal via the internet.
 - FOJP has access by logging onto its office system.



Registering for a New NavRisk Account

1. Log into the NavRisk Portal server. The URL is: <https://navrisk.fojp.com>
2. Select **Register** and complete the registration form as directed.



New User Registration

- The data fields in bold are required.
- When finished press register.
- You will receive an e-mail in your inbox notifying you that an FOJP representative will review and approve your application shortly.

Register for online access

[Return to login screen](#)

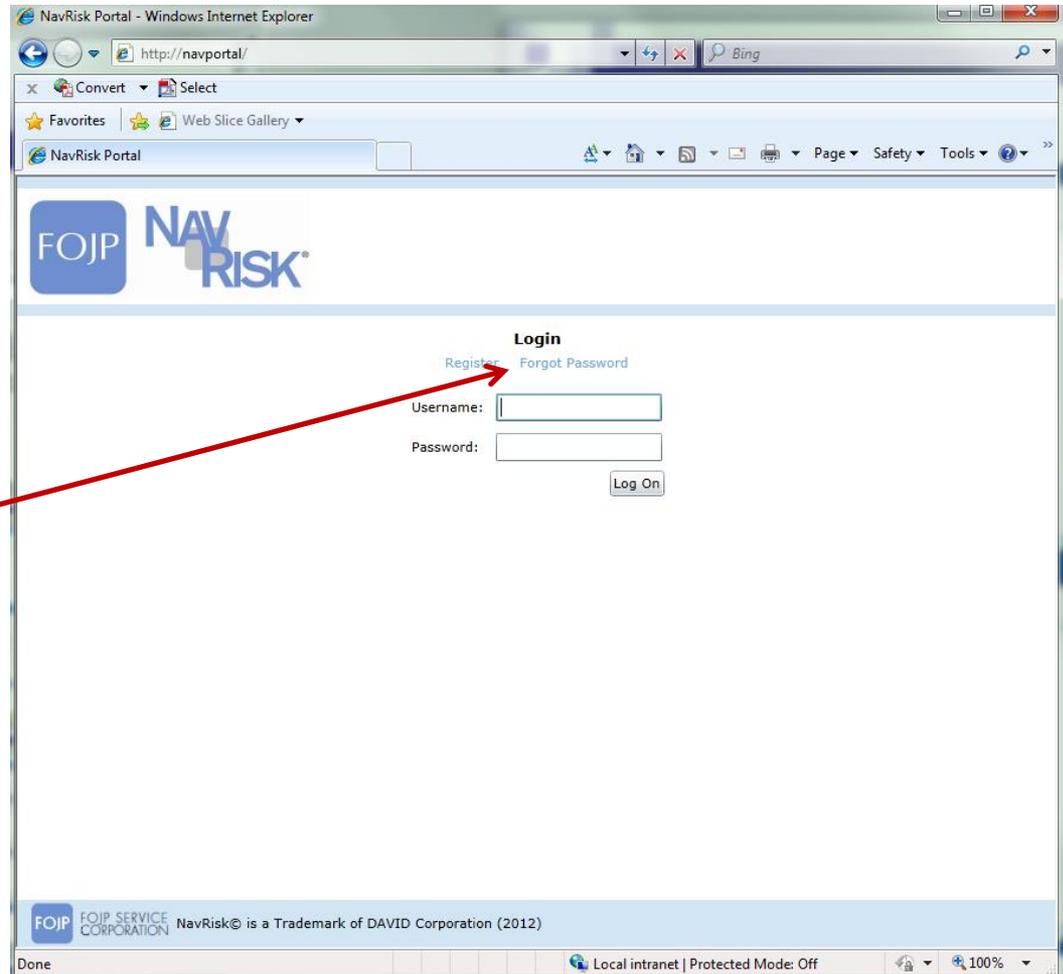
Username:	<input type="text"/>	
Email:	<input type="text"/>	
Password:	<input type="password"/>	
Password Confirmation:	<input type="password"/>	
Security Question:	<input type="text"/>	
Answer to Security Question:	<input type="text"/>	

First Name:	<input type="text"/>	
Last Name:	<input type="text"/>	
Organization Name:	<input type="text"/>	
Job Title:	<input type="text"/>	
Phone:	<input type="text"/> Extension: <input type="text"/>	
Fax:	<input type="text"/>	
Address Line 1:	<input type="text"/>	
Address Line 2:	<input type="text"/>	
City:	<input type="text"/> State: <input type="text"/> Zip: <input type="text"/>	
Comments:	<input type="text"/>	

Register

Registered Users

- If you have already registered, log in with your username and password.
- If you have forgotten your password click, **'Forgot Password'**.
 - You will be prompted to answer your security question at which point your password will be sent to you via e-mail.



Using the NavRisk System

When you log in, you will see the NavRisk Portal Home page.

NavRisk Portal - Windows Internet Explorer

http://navportal/

Welcome cperkins
Last Login: 4/27/2012 9:56:31 AM
Logout

FOJP NAV RISK

Clients Program Year Policy

Forms Home Reports

Inbox

Number	Category	Client Name	Program Year	Status	Description
NQFIDA400002011G-01	Renewal	FOJP Service Corporation	2011	Open	Renewal application

Client Policies

Request Endorsement	View Reports List	Coverage Type	Number	Client Name	Prog
View	View	Workers' Compensation	NPWCA310002012G-01	FOJP Service Corporation	2012

FOJP FOJP SERVICE CORPORATION NavRisk® is a Trademark of DAVID Corporation (2012)

Done Local intranet | Protected Mode: Off 100%

■ **Policy Search Field** is above the Home Page.

- This section is for a *quick* policy search.
- Each field has a dropdown.
- Click **Client** to confirm your entity's name and **Program Year** for the policy year you wish to locate, and **Policy** for the policy type.

Using the NavRisk System *Cont'd*

The top section is an action *Inbox*.

- All requests/interactions with FOJP will appear in this section.

The screenshot shows the NavRisk Portal interface. At the top, there are search filters for Clients, Program Year, and Policy. Below this is a navigation bar with 'Home' and 'Reports' icons. The main content area is divided into two sections: 'Inbox' and 'Client Policies'. The 'Inbox' section contains a table with columns for Client Name, Program Year, Status, Description, View Questionnaire, View History, and Proposed Start Date. A red box highlights the 'Home' and 'Reports' icons in the left navigation bar. Another red box highlights the 'Refresh' button and the 'Inbox Status' checkboxes (Open and Pending) on the right side of the 'Inbox' table. A red arrow points from the 'Reports' icon to the 'Inbox' table.

Client Name	Program Year	Status	Description	View Questionnaire	View History	Proposed Start Date
FOJP Service Corporation	2011	Open	Renewal application ready for review	View	View	4/27/2012

Request Endorsement	View Reports List	Coverage Type	Number	Client Name	Program Year	Status	Effective Date	Policy Status
View	View	Workers' Compensation	NPWCA310002012G-01	FOJP Service Corporation	2012	Current	3/15/2012	<input checked="" type="checkbox"/> Current <input type="checkbox"/> Pending <input type="checkbox"/> Expired

- Actions can be narrowed down and sorted by clicking on the '**Open**' or '**Pending**' tools on the right navigation bar.
- On the left navigation bar, the '**Home**' icon can be clicked at any time to return to the home page.
- '**Reports**' icon can also be seen on the left.

Using the NavRisk System *Cont'd*

The bottom section is titled ***Client Policies***

The screenshot shows the NavRisk Portal interface. At the top, there are search filters for 'Clients', 'Program Year', and 'Policy'. Below this is the 'Inbox' section with a table of items. The 'Client Policies' section is located below the inbox and contains a table with columns: Request Endorsement, View Reports List, Coverage Type, Number, Client Name, Program Year, Status, and Effective Date. A red box highlights the 'Refresh' button and the 'Policy Status' filter (Current, Pending, Expired) in the 'Client Policies' table.

Request Endorsement	View Reports List	Coverage Type	Number	Client Name	Program Year	Status	Effective Date
View	View	Workers' Compensation	NPWCA310002012G-01	FOJP Service Corporation	2012	Current	3/15/2012

View a list of the current, pending, or expired policy expirations and exposure data back to 2010.

If the 'Current', 'Pending', and 'Expired' tools do not narrow down a search sufficiently, you may use the 'Policy Search Field' to select the program year and specific policy needed.

Running a Report

NavRisk Portal - Windows Internet Explorer

http://navportal/

Welcome cperkins
Last Login: 4/27/2012 9:56:31 AM
Logout

Forms << Home [x]

Inbox

Drag a column header here to group by that column

Client Name	Program Year	Status	Description	View Questionnaire	View History	Proposed Start Date
FOJP Service Corporation	2011	Open	Renewal application ready for review	View	View	4/27/2012

Refresh

Inbox Status:
 Open
 Pending

Client Policies

Drag a column header here to group by that column

Request Endorsement	View Reports List	Coverage Type	Number	Client Name	Program Year	Status	Effective Date
View	View	Workers' Compensation	NPWCA310002012G-01	FOJP Service Corporation	2012	Current	3/15/2012

Refresh

Policy Status:
 Current
 Pending
 Expired

FOJP NAV RISK

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Done Local intranet | Protected Mode: Off 100%

Go to the Policy search area

- Click **'Policy'** (a) and select the policy.
- Click **'Program Year'** (b) and select the policy year.

Then, go to the **'Navigation Bar'** (c) located on the far left side of the Home page

- Click the **'Reports'**.
See *next page* or *Appendix* for a list of available reports.

Running a Report *Cont'd*

Choose the report type you wish to view.

The screenshot shows the NavRisk Portal interface. At the top, there are navigation tabs for 'Home' and 'Reports List'. The 'Policy Reports' section is active, displaying a table with columns for 'View Report' and 'Report Description'. The 'View Report' column contains buttons for various report types, which are circled in red. A red arrow points from this area to the right-hand side of the image.

View Report	Report Description
View	Boiler and Machinery Schedule
View	Census Schedule
View	Commercial Crime Schedule
View	Client Acceptance Form
View	DMV Abstract Schedule

Below the table, there is a 'Reports' section with columns for 'View Report', 'Report Description', 'Endorsement Date', and 'Endorsement Number'.

View	Boiler and Machinery Schedule
View	Census Schedule
View	Commercial Crime Schedule
View	Client Acceptance Form
View	DMV Abstract Schedule
View	Abstract Request Sheet
View	Flood Schedule
View	Foreign Package Trips Schedule
View	Foreign Package Assets Schedule
View	GL Activity Schedule
View	GL Employee Schedule
View	Location and Tanks Schedule
View	Property Schedule
View	Schedule of Insurance
View	Vehicle Schedule
View	WC Payroll Schedule

Sample Report: Property Report

NavRisk Portal - Windows Internet Explorer

http://navportal/

NavRisk Portal

Welcome cperkins
Last Login: 4/27/2012 9:56:31 AM
Logout

FOJP NAV RISK

Clients: FOJP Service Corporation

Program Year: 2010-2011 Property/Boiler & Machinery

Policy: NPPROPBMA310002010G-01

Forms << Home [X] Reports List [X] Property Schedule [X]

Home Reports

FOJP

Property Schedule

Building											Square Feet		Fire Protection			Monetary Values				
Address	ZIP	Prop	Const Type	Occup Type	Owned or Leased	# of Stories	# of Bldgs	Basement	Year Built	Year Renov	Owned	Leased	Sprinkler	Smoke	Alarm	Building	Contents	Business Interruption	Builders Risk	Property TIV
FOJP Service Corporation																				
28 E 28th Street NY, NY	10016	Non-Patient Care	Fire Resistive	Administrative	Leased	15	0	Yes	0	0		61,000	100%	Yes	Central	\$0	\$3,000,000	\$19,697,000	\$0	\$22,697,000
Time Record Storage: 1000 Dean Street Brooklyn, NY	11238	Non-Patient Care	Non-Combustible	Warehouse	Leased	0	0	Unknown	0	0		5,954	100%	Yes	Unknown	\$0	\$5,000,000	\$0	\$0	\$5,000,000
Sub Total: FOJP Service Corporation											0	66,954				\$0	\$8,000,000	\$19,697,000	\$0	\$27,697,000
Total: FOJP Service Corporation											0	66,954				\$0	\$8,000,000	\$19,697,000	\$0	\$27,697,000
Grand Totals:											0	66,954				\$0	\$8,000,000	\$19,697,000	\$0	\$27,697,000

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Done Local intranet | Protected Mode: Off 100%

Sample Report: Schedule of Insurance



Clients

FOJP Service Corporation

Program Year

2012-2013 Automobile

Policy

NPAUTOA400002012S-01

Welcome cperkins11
Last Login: 5/1/2012 2:51:01 PM
[Logout](#)

Forms <<

Home

Reports List

Schedule of Insura

Home

Report



Schedule of Insurance

FOJP Service Corporation
A40000

COVERAGE	Carrier	Broker	Policy No.	Policy Period	Limits	Deductible
Group Policies						
Business Travel Accident	Federal Insurance Company	Frank Crystal & Company, Inc.	9905-06-33	08/16/2007-08/16/2012	Accidental Death and Dismemberment Accident Medical Expense AD&D-Prof Staff/Guest - \$100,000 Each Insured Person AD&D-Volunteers - \$10,000 Each Insured Person Acc. Med Exp - \$3 million Aggregate Each Accident Acc. Med Exp-Prof Staff/Volunteers - \$10,000 Each Insured Person	
Commercial Crime	National Union Fire Ins Co Pittsburgh PA	Frank Crystal & Company, Inc.	02-880-2525	07/30/2011-07/30/2012	\$10 million Each Occurrence Except Credit Card Forgery - \$500,000	\$25,000 Except Credit Card Forgery - \$500 Money Orders & Counterfeit Currency - \$0 Employee Benefit Plans - \$0 Lessees of Safe Deposit Boxes - \$250,000 Securities Deposited with Others - \$250,000
Excess Commercial Crime First	Westchester Fire Insurance Company(100%)		G2165985A009	07/30/2011-07/30/2012	\$15 million excess of \$10 million	\$0
Excess Commercial Crime Second	National Union Fire Ins Co Pittsburgh PA(100%)		028802526	07/30/2011-07/30/2012	\$10 million excess of \$25 million	\$0
Disability	Zurich American Insurance Company	Frank Crystal & Company, Inc.	5351340	07/01/2011-07/01/2012	Statutory	

Form

Form

Renewing a Group Policy

E-Mail Inbox Notification from FOJP:

- Quote/Endorsement/Policy Number: NQXXXXA400002012S-01
- Client Name: FOJP Service Corporation
- Action: Renewal Proposal Ready for Review
- Notes: Your policy is up for renewal, please make any necessary changes by visiting <http://navrisk.fojp.com>

- An e-mail from FOJP will notify you that a policy is being published for renewal.

The screenshot shows the NavRisk Portal interface in a Windows Internet Explorer browser. The page displays a navigation menu on the left with 'Forms' selected. The main content area is titled 'Inbox' and contains a table with the following data:

Client Name	Program Year	Status	Description	View Questionnaire	View History	Proposed Start Date	Inbox Status
FOJP Service Corporation	2011	Open	Renewal application ready for review	View		4/27/2012	<input checked="" type="checkbox"/> Open <input type="checkbox"/> Pending

Below the 'Inbox' table is a 'Client Policies' section with a table containing one policy entry:

Request Endorsement	View Reports List	Coverage Type	Number	Client Name	Program Year	Status	Effective Date	Policy Status
View	View	Workers' Compensation	NPWCA310002012G-01	FOJP Service Corporation	2012	Current	3/15/2012	<input checked="" type="checkbox"/> Current <input type="checkbox"/> Pending <input type="checkbox"/> Expired

Red annotations in the screenshot include a box around the 'Renewal application ready for review' text in the inbox table, a red arrow pointing to it from the right, and a red circle around the 'Refresh' button in the top right corner of the 'Inbox' section.

- Your NavRisk Portal 'Inbox' will contain a renewal policy e-mail.
 - If it does not, select 'Refresh'.

Renewing a Group Policy Cont'd

- As in prior years, you will be asked to update your data for the particular policy being renewed.
- In order to update your data from the previous year, select **'View'** under heading **'View Questionnaire'**. It may take a moment to retrieve the data from the system.*

The screenshot shows the NavRisk Portal interface. At the top, there are navigation menus for 'Clients', 'Program Year', and 'Policy'. Below this, the 'Inbox' section contains a table with columns: Client Name, Program Year, Status, Description, View Questionnaire, View History, and Proposed Start Date. A red box highlights the 'View' link under the 'View Questionnaire' column for the entry 'FOJP Service Corporation' with a status of 'Open'. To the right of the 'Inbox' table is an 'Inbox Status' panel with checkboxes for 'Open' and 'Pending'. Below the 'Inbox' section is the 'Client Policies' section, which contains a table with columns: Request Endorsement, View Reports List, Coverage Type, Number, Client Name, Program Year, Status, and Effective Date. The 'Client Policies' table shows a policy for 'Workers' Compensation' with a status of 'Current'. At the bottom of the page, there is a footer with the FOJP logo and the text 'NavRisk is a Trademark of DAVID Corporation (2012)'.

*How long it takes to retrieve data is dependent on many factors, including internet speed.

Renewing a Group Policy Cont'd

FOJP NAV RISK

Welcome cbaestra
Last Login: 5/4/2012 9:20:34 AM
Logout

Clients: FOJP Service Corporation
Program Year: 2011-2012 Fiduciary Liability
Policy: NQFIDA400002011G-02

Forms: Home, Reports

Home Questionnaire

Home

Client Information

Profile

Selected Coverages

Contacts

Policy Scheduled Items

Client Activity Questions

Fiduciary Liab - App Info

Fiduciary Liab - App Sign-Off

Fiduciary Liab - Coverage Req

Fiduciary Liab - Fiduciary Info

Fiduciary Liab - Prior Ins

Fiduciary Liab - Prior Knwldg

Summary of Changes

Finish

Save Refresh

Mark this section as complete and accurate

Client Name: FOJP Service Corporation

Short Name: FOJP Service Corporation

Client Type: Agency

Client Number: A40000

Client Description: Risk Management Organization

Relationship: Self

Not for profit under US IRC: Yes

For Profit Description: N/A

Mailing Address

Mailing Address 1: 28 East 28th Street

Mailing Address 2:

Mailing City: New York

Mailing State: NY

Mailing Zip: 10016-

Mailing County: New York

Physical Address

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On the far left of the screen you will see a series of red nodes.

- Review and edit the information in each section, as needed.
- Select **'Mark this section as complete and accurate'** and click **'Save'**.
- Please note: You will not be able to go to the next node until you have marked the section and hit **'Save'**.
- The saved node will turn green.

Home Questionnaire

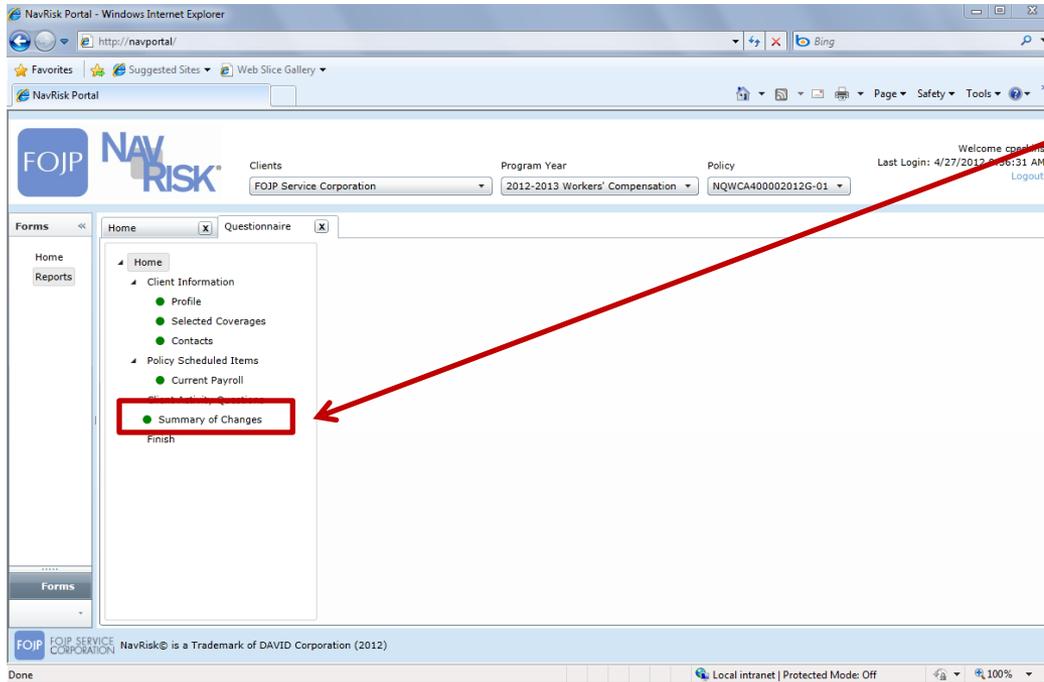
Home

Client Information

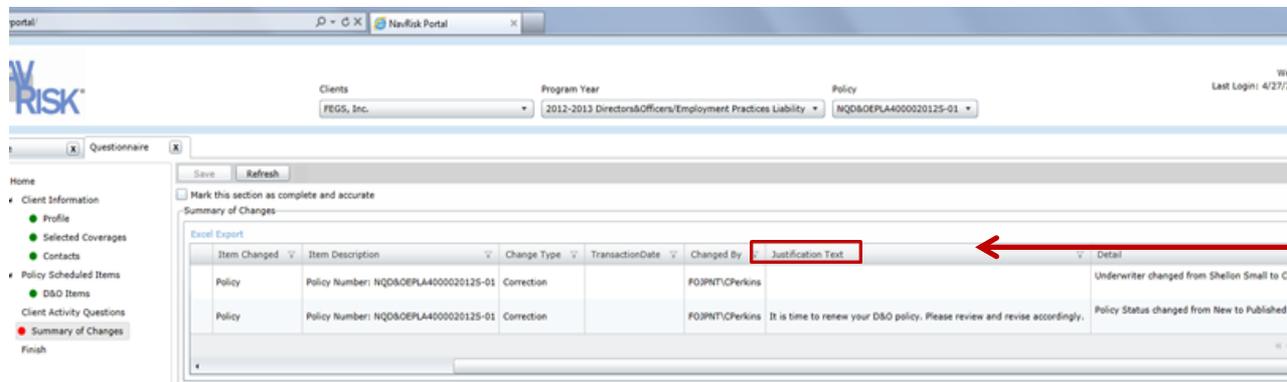
Profile

Selected Coverages

Renewing a Group Policy *Cont'd*



- Review your changes at the **'Summary of Changes'** node.



- You can view all changes made in the **'Text Justification'** column.

Renewing a Group Policy *Cont'd*

The screenshot shows the NavRisk Portal interface in a Windows Internet Explorer browser. The address bar displays 'http://navportal/'. The page header includes the FOJP NAV RISK logo, client information (FOJP Service Corporation), program year (2012-2013 Workers' Compensation), and policy number (NQWCA400002012G-01). A user is logged in as 'cperkins' with a last login time of 4/27/2012 9:56:31 AM. The main content area shows a navigation tree with the following items: Home, Client Information (Profile, Selected Coverages, Contacts), Policy Scheduled Items (Current Payroll), Client Activity Questions, Summary of Changes, and a 'Finish' button. The 'Finish' button is highlighted with a red box and a red arrow points to it from the right side of the slide.

- After all nodes have been reviewed and saved, and all nodes are green, click **'Finish'**.

Renewing a Group Policy *Cont'd*

- At the final submission screen:
 - Read the Agreement.
 - Navigate to the '**Comments to Insurance Services**' field and type a comment or question here.
 - If you have a question about the renewal, click '**Submit**' and type your question in the box labeled '**Comments for Insurance Services**'.
 - If you do not have a question, click '**Authorize**'.

http://navportal/ NavRisk Portal

Welcome cbalestra
Last Login: 4/30/2012 4:20:56 PM
Logout

Forms

Home

Reports

Home

Client Information

- Profile
- Selected Coverages
- Contacts

Policy Scheduled Items

- Current Payroll

Client Activity Questions

- Summary of Changes

Finish

Read the agreement below and click on Submit to proceed.

By clicking on the Final Submit button below, you are warranting that to the best of your knowledge, the information contained herein is complete and correct and that the submitter is authorized to attest to its accuracy. Please be advised that any misrepresentation contained herein could potentially void your coverages.

You are about to submit the Renewal Questionnaire. Once submission is complete, you will no longer have the ability to make further changes online. Please confirm that all of the information including the scheduled items are correct before clicking on the final Submit button below. Should you have any comments to be submitted to Insurance Services with your Renewal Questionnaire, please enter them below.

Comments for Insurance Services:

The employee payroll schedule has been updated. Thanks.

Submit Authorize

FOJP NAV RISK CORPORATION NavRisk is a Trademark of DAVID Corporation (2012)

Renewing a Group Policy Cont'd

- The status of this task in your Inbox will change from 'open' to 'pending'— the description describes the pending activity.
 - The view questionnaire is now grayed.
- FOJP will review all policy data you submitted regardless of the 'Submit' or 'Authorize' selection; but FOJP will not process the policy further until all questions have been answered by someone from the Insurance Services Department and you have authorized the policy.
- Once you have authorized your renewal and it's been bound by FOJP, you will see that it moves from your NavRisk Inbox to your list of 'Client Policies'.

The screenshot displays the NavRisk web application interface. At the top left is the FOJP NAV RISK logo. To the right, there are filters for 'Clients', 'Program Year', and 'Policy', each with a dropdown menu. Further right, the user is logged in as 'cperkins11' with a 'Last Login' of '5/1/2012 2:51:01 PM' and a 'Logout' link.

The main content area is divided into two sections:

Inbox

Drag a column header here to group by that column

Client Name	Program Year	Status	Description	View Questionnaire	View History	Proposed St
FOJP Service Corporation	2012	Pending	Endorsement proposal submitted for bind	View	View	5/3/2012
FOJP Service Corporation	2011	Pending	Renewal proposal submitted for binding	View	View	4/27/2012
FOJP Service Corporation	2011	Pending	Renewal proposal submitted for binding	View	View	4/27/2012

Refresh

Inbox Status

Open

Pending

Client Policies

Drag a column header here to group by that column

Request Endorsement	View Reports List	Coverage Type	Number	Client Name	Program Year	Status
View	View	Automobile	NPAUTOA400002012S-01	FOJP Service Corporation	2012	Current
View	View	Workers' Compensation	NPWCA400002012G-02	FOJP Service Corporation	2012	Current

Refresh

Policy Status

Current

Pending

Expired

Questions About a Renewal

- If FOJP requests additional information, you will receive a new e-mail in the **NavRisk Inbox**.
- The NavRisk e-mail will allow you to view the questionnaire and make any necessary changes. Similarly, if you request any additional information before authorizing, click '**Submit**'. You will receive a reply in your e-mail prompting you to check your NavRisk Inbox for FOJP's response.
- Once you have reviewed FOJP's response and are confident your questions have been answered, please click '**Finish**' and select, '**Authorize**'.

Renewing a Group Policy *Cont'd*

- When FOJP is satisfied with the information submitted, FOJP will go to the insurance brokers to obtain insurance quotes.
 - Once FOJP completes negotiation of the renewal premium information for the group policies (*i.e.*, Property, GL, Auto), the policy will be bound.
 - The renewal application will be automatically deleted from your NavRisk '**Inbox**' and the new policy will be placed in the **Client Policy** section of the '**Home**' page.

Renewing an Individual/Special Coverage

E-Mail Inbox Notification from FOJP:

- Quote/Endorsement/Policy Number: NQXXXXA400002012S-01
- Client Name: FOJP Service Corporation
- Action: Renewal Proposal Ready for Review
- Notes: Your policy is up for renewal, please make any necessary changes by visiting <http://navrisk.fojp.com>

- You will receive a policy renewal request in your personal **E-Mail Inbox** prompting you to go to the NavRisk Portal, <http://navrisk.fojp.com>.

The screenshot shows the NavRisk Portal interface in a Windows Internet Explorer browser. The page title is "NavRisk Portal - Windows Internet Explorer" and the address bar shows "http://navportal/". The page features the FOJP and NAVRISK logos, a navigation menu, and a main content area. The "Inbox" section is highlighted, showing a table of notifications. A red box highlights the "View Questionnaire" link in the "Action" column of the first row. A red arrow points from the text in the first block to this link. Below the "Inbox" section is the "Client Policies" section, which also contains a table of policy information.

Client Name	Program Year	Status	Description	Action	History	Proposed Start Date
FOJP Service Corporation	2011	Open	Renewal application ready for review	View Questionnaire	View	4/27/2012

Request Endorsement	View Reports List	Coverage Type	Number	Client Name	Program Year	Status	Effective Date	Policy Status
View	View	Workers' Compensation	NPWCA310002012G-01	FOJP Service Corporation	2012	Current	3/15/2012	<input checked="" type="checkbox"/> Current <input type="checkbox"/> Pending <input type="checkbox"/> Expired

- When you log on, you will go to the top of the Home page titled **Inbox**; you will see a notification from FOJP.
- Go to the column titled '**View Questionnaire**' and click on the '**View Tab**'.

Renewing an Individual/Special Coverage Cont'd

NavRisk Portal - Windows Internet Explorer

http://navportal/

Welcome cperkins
Last Login: 4/27/2012 9:56:31 AM
Logout

FOJP NAV RISK®

Clients: FOJP Service Corporation
Program Year: 2011-2012 Fiduciary Liability
Policy: NQFIDA400002011G-01

Forms: Home, Questionnaire

Home

Client Information

- Profile
- Selected Coverages**
- Contacts

Policy Scheduled Items

Client Activity Questions

- Fiduciary Liab - App Info
- Fiduciary Liab - App Sign-Off
- Fiduciary Liab - Coverage Re
- Fiduciary Liab - Fiduciary Inf
- Fiduciary Liab - Prior Ins
- Fiduciary Liab - Prior Knowldg
- Summary of Changes

Finish

Save Refresh

Mark this section as complete and accurate

Selected Coverages

Selected	Description	Effective Date	Termination Date
<input checked="" type="checkbox"/>	Fiduciary Liability	10/31/2011	10/31/2012

FOJP FOJP SERVICE CORPORATION NavRisk® is a Trademark of DAVID Corporation (2012)

Done Local intranet | Protected Mode: Off 100%

- On the far left of the screen you will see a series of red nodes.
- Review and edit the information in each section, as needed.
- Select **'Mark this section as complete and accurate'** and click **'Save'**.
- Please note: You will not be able to go to the next node until you have marked the section and hit **'Save'**.
- The saved node will turn green.

Home Questionnaire

Home

Client Information

- Profile**
- Selected Coverages

Renewing an Individual/Special Coverage Cont'd

Please note when you get to the section under 'Client Activity Questions', note blue arrow tabs; click on the arrow tabs in order to reveal a drop down list of questions relevant to the main question on the tab.

Please note the potential of multiple pages associated with questions.

The screenshot shows the NavRisk Portal interface in a Windows Internet Explorer browser. The page displays a questionnaire for 'FOJP Service Corporation' under the '2011-2012 Fiduciary Liability' program. The 'Client Activity Questions' section is expanded, showing a list of questions (FLI-4a through FLI-7a) with 'Required' and 'Response' columns. A red circle highlights a blue arrow tab next to question FLI-4a. Another red circle highlights a blue arrow tab next to question FLI-5. A red arrow points from the text above to a blue arrow tab next to question FLI-31b, which is expanded to show a sub-question: 'Are all defined benefit plans adequately funded in accordance with ERISA or any applicable similar common or statutory law of the United States, Canada or any state or other jurisdiction anywhere in the world, as attested to by an actuary?'. The 'Required' column for this question has a checkmark, and the 'Response' column is empty. The bottom of the page shows a pagination control with '1' and '2' buttons.

Question #	Question	Required	Response
FLI-4a	Who is the Executive Officer authorized to receive notices and information regarding the proposed policy?	✓	
FLI-4b	Name of Executive Officer authorized:	✓	
FLI-4c	Title of Executive Officer authorized:	✓	
FLI-4d	E-mail address of Executive Officer authorized:	✓	
FLI-4e	Phone of Executive Officer authorized:	✓	
FLI-4f	Fax of Executive Officer authorized:	✓	
FLI-5	Does the Internal		
FLI-6a	Does the organiza		
FLI-7a	Does the includin		
FLI-31a	Please complete the next question if you have defined benefit plans:		
FLI-31b	Are all defined benefit plans adequately funded in accordance with ERISA or any applicable similar common or statutory law of the United States, Canada or any state or other jurisdiction anywhere in the world, as attested to by an actuary?	✓	

Renewing an Individual/Special Coverage Cont'd

- Once you have completed all sections click **'Finish'**.
- If you have a question about the renewal, type your question in the box labeled **'Comments for Insurance Services'** and click **'Submit'**.
- If you do not have a question, click **'Authorize'**.

The screenshot shows the NavRisk Portal interface in Internet Explorer. The browser address bar shows <http://navportal/>. The page header includes the FOJP NAV RISK logo, client information (FOJP Service Corporation), program year (2012-2013 Workers' Compensation), and policy number (NQWCA400002012G-01). The user is logged in as cperkins, with a last login time of 4/27/2012 9:56:31 AM. The main content area displays a list of forms on the left sidebar, including Home, Reports, Client Information, Policy Scheduled Items, Client Activity Questions, and Summary of Changes. The 'Finish' button is circled in red. The main content area contains a red warning message: "Read the agreement below and click on Submit to proceed." Below this, there is a text box for "Comments for Insurance Services" which is highlighted with a red box. At the bottom of the form, there are two buttons: "Submit" and "Authorize", both of which are circled in red. The footer of the page includes the FOJP logo and the text "NavRisk® is a Trademark of DAVID Corporation (2012)".

Renewing an Individual/Special Coverage Cont'd

- When FOJP is satisfied with the information submitted, FOJP will go to the insurance brokers to obtain insurance quotes. Once that is complete you will receive another e-mail from FOJP prompting you to return to your NavRisk Inbox in order to review the **'Client Acceptance Form'**.
- When you log back into NavRisk, go straight to the Report tab; click on the **'Client Acceptance Form'**.

The screenshot shows the NavRisk Portal interface in a Windows Internet Explorer browser window. The page displays the FOJP and NAV RISK logos, user information (Welcome cperkins, Last Login: 4/27/2012 9:56:31 AM), and navigation options. The main content area is titled 'Forms' and includes a 'Policy Reports' section. A table of reports is shown, with the 'Client Acceptance Form' row highlighted by a red rectangle. Below this is an 'Invoice Reports' section with a table of reports.

View Report	Report Description
View	Boiler and Machinery Schedule
View	Census Schedule
View	Commercial Crime Schedule
View	Client Acceptance Form
View	DMV Abstract Schedule

View Report	Report Description	Endorsement Date	Endorsement Number
View	Proposal	4/27/2012 11:00:00 AM	6000

Renewing an Individual/Special Coverage *Cont'd*

- The 'Client Acceptance Form' will contain competing quotes for the renewal.
- Print, complete, sign the form and then fax or e-mail the original to your contact at FOJP.

NavRisk Portal - Windows Internet Explorer
 http://navportal/

Welcome cperkins
 Last Login: 4/27/2012 9:56:31 AM
[Logout](#)

FOJP NAV RISK

Clients: FOJP Service Corporation
 Program Year: 2011-2012 Fiduciary Liability
 Policy: NQFIDA400002011G-01

Forms: Home | Questionnaire | Reports List | Client Acceptance

FOJP Service Corporation
 Fiduciary Liability
 10/31/2011 - 10/31/2012

Description	Expiring Coverage	Option A	Option B	Option C	Option D	Option E
Primary Layer	NPFIDA400002010G-01	NQFIDA400002011G-01	NQFIDA400002011G-02	NQFIDA400002011G-03		
Carrier	National Union Fire Ins Co Pittsburgh PA		ACE Property & Casualty Insurance Co.	Allied World Assurance Co (U.S.) Inc.		
Limit	\$25 million Each Loss \$25 million Aggregate					
Deductible	\$100,000	\$100,000	\$100,000	\$1,000		
Annual Premium						
Total Premium						

Coverage includes: % Change from Expiring
 Option A
 Option B
 Option C
 Option D
 Option E

Please circle your selection: A B C D E

Client Signature: _____
 Print Name: _____
 Print Title: _____

FOJP NAV RISK
 FOJP SERVICE CORPORATION
 NavRisk® is a Trademark of DAVID Corporation (2012)

Done Local intranet | Protected Mode: Off 100%

Updating Information/Requesting Additional Coverage

- When you want to either update contact information or add an exposure to your policy (*i.e.*, a new vehicle, new property location, new employee), this is an **'Endorsement'**.
 - To request an endorsement; navigate to the **'Client Policies'** area of the **Home Page** located below the Inbox.

The screenshot displays the NavRisk Portal in a Windows Internet Explorer browser. The page features a header with the FOJP and NavRisk logos, navigation menus for Clients, Program Year, and Policy, and a user login area for 'cperkins' with a last login date of 4/27/2012. The main content area is divided into two sections: 'Inbox' and 'Client Policies'. The 'Inbox' section contains a table with columns for Client Name, Program Year, Status, Description, View Questionnaire, View History, and Proposed Start Date. The 'Client Policies' section, which is highlighted with a red box, contains a table with columns for Request Endorsement, View Reports List, Coverage Type, Number, Client Name, Program Year, Status, and Effective Date. The footer includes the FOJP logo and the text 'NavRisk is a Trademark of DAVID Corporation (2012)'.

Client Name	Program Year	Status	Description	View Questionnaire	View History	Proposed Start Date
FOJP Service Corporation	2011	Open	Renewal application ready for review	View	View	4/27/2012

Request Endorsement	View Reports List	Coverage Type	Number	Client Name	Program Year	Status	Effective Date
View	View	Workers' Compensation	NPWCA310002012G-01	FOJP Service Corporation	2012	Current	3/15/2012

Updating Information/Requesting Additional Coverage *cont'd*

- Locate the policy you want to update, select **'View'** under the **'Request Endorsement'** column of the policy.
 - A prompt will appear with the current date, click **'Create Endorsement'**.

The screenshot shows the NavRisk Portal interface in a Windows Internet Explorer browser. The browser address bar shows 'http://navportal/'. The page header includes the FOJP NAV RISK logo, client information (FOJP Service Corporation), program year (2011-2012 Fiduciary Liability), and policy number (NQFIDA400002011G-01). The user is logged in as 'cperkins' with a last login of 4/27/2012 9:56:31 AM.

The main content area displays a table of policies under the 'Inbox' section. The table has columns for 'Number' and 'Category'. Two policies are listed:

Number	Category
NQWCA400002012G-01	Renewal
NQFIDA400002011G-01	Renewal

A 'Create Endorsement' dialog box is open in the foreground, showing the 'Effective Date' field set to '4/27/2012'. The dialog box has 'Create Endorsement' and 'Cancel' buttons.

The background table also has a 'Request Endorsement' column with a 'View' button. The 'Client Policies' section below shows a table with columns for 'Request Endorsement', 'View Reports List', 'Program Year', 'Status', and 'Effective Date'. A policy is listed with '2012' for Program Year, 'Current' for Status, and '3/15/2012' for Effective Date.

The footer of the page includes the FOJP logo and text: 'FOJP SERVICE CORPORATION NavRisk® is a Trademark of DAVID Corporation (2012)'. The browser status bar shows 'Done' and 'Local intranet | Protected Mode: Off'.

Updating Information/Requesting Additional Coverage *cont'd*

- Click on the icon of the exposure type you wish to add.
 - **EXAMPLE:** If you are adding a new vehicle to the auto policy, click on 'Vehicle' under the 'Policy Scheduled Items'.

The screenshot displays the NavRisk Portal interface within a Windows Internet Explorer browser. The address bar shows the URL <http://navportal/>. The page header includes the FOJP and NAV RISK logos, and navigation options for Clients, Program Year, and Policy. The current client is 'FOJP Service Corporation', the program year is '2012-2013 Automobile', and the policy is 'NQAUTOA400002012S-02'. The user is logged in as 'cperkins' with a last login time of '4/27/2012 9:56:31 AM'. The main content area is divided into a left sidebar and a main panel. The sidebar shows a tree view of navigation options: Home, Reports, Client Information (Profile, Selected Coverages, Contacts), Policy Scheduled Items (Driver Abstracts, Vehicles), Client Activity Questions, Summary of Changes, and Finish. The 'Vehicles' option is selected. The main panel displays a 'Save' and 'Refresh' button, a checkbox for 'Mark this section as complete and accurate', and a table with columns: Effective Date, Termination Date, Child Client, Vehicle Number, Year, Make, Model/Description, VIN, and License Pl. The table is currently empty, and a message prompts the user to 'Drag a column header here to group by that column'.

Updating Information/Requesting Additional Coverage *cont'd*

- Select the corresponding policy to be updated. There are options to edit/add/delete.
 - Click **Add** for all new exposures.
 - An Edit window will appear; this will allow you to add your new endorsement.

The screenshot shows the NavRisk Portal interface in a Windows Internet Explorer browser. The browser address bar shows <http://navportal/>. The page title is "NavRisk Portal". The main content area displays the "Edit" dialog box for a policy. The dialog box contains the following fields:

- Effective Date: 1/1/2012
- Termination Date: 1/1/2013
- Child Client: (dropdown menu)
- Vehicle Number: (text input)
- Year: (text input)
- Make: (dropdown menu)
- Model/Description: (text input)
- VIN: (text input)
- License Plate Number: (text input)
- Registration Type: (dropdown menu)
- Registration Status: (dropdown menu)
- Registration Expiration Date: <M/d/yyyy>

The background of the portal shows the "FOJP NAV RISK" logo, a navigation menu with "Forms" and "Reports" sections, and a table with columns for "Year", "Make", "Model/Description", "VIN", and "Lic". The footer of the portal includes the text "FOJP FOJP SERVICE CORPORATION NavRisk® is a Trademark of DAVID Corporation (2012)". The browser status bar at the bottom indicates "Local intranet | Protected Mode: Off" and "100%" zoom.

Updating Information/Requesting Additional Coverage *cont'd*

- Once you have added the endorsement and are satisfied that the information is accurate, mark the section as complete, click **'Save'**.
- Please note: In the summary of changes section you can view all changes made in the **'Text Justification'** column.

The screenshot displays the NavRisk Portal interface within a Windows Internet Explorer browser window. The browser's address bar shows the URL <http://navportal/>. The page header includes the FOJP NAV RISK logo, client information (FOJP Service Corporation), program year (2012-2013 Automobile), and policy number (NQAUTOA400002012S-02). A user login for 'cperkins' is visible in the top right corner.

The main content area is titled 'Forms' and contains a navigation menu on the left with options like Home, Reports, Client Information, Policy Scheduled Items, and Summary of Changes. The 'Questionnaire' tab is active, and the 'Save' button is highlighted with a red box. Below the 'Save' button, there is a checkbox labeled 'Mark this section as complete and accurate' and a 'Summary of Changes' section. The 'Summary of Changes' section includes an 'Excel Export' link and a table with the following data:

Transaction ID	Transaction Number	Item Changed	Item Description	Change Type	Tr
39643	1	Policy	Policy Number: NQAUTOA400002012S-02	Record created	

The footer of the page contains the FOJP logo, the text 'FOJP SERVICE CORPORATION', and a copyright notice: 'NavRisk® is a Trademark of DAVID Corporation (2012)'. The browser's status bar at the bottom indicates 'Local intranet | Protected Mode: Off' and a zoom level of 100%.

Updating Information/Requesting Additional Coverage *cont'd*

- Once you are satisfied with your submission, select the **'Finish'** tab at the bottom of the Questionnaire page.
 - The Authorization page will appear.
- Click **'Authorize'**.
 - Once FOJP receives the endorsement request, it will process.
 - Please note if you have a question about your submission, type your question in **'Comments for Insurance Services'** box and select **'Submit'** instead of **'Authorize'**. FOJP will review and respond.

The screenshot shows the NavRisk Portal in a Windows Internet Explorer browser window. The address bar shows the URL <http://navportal/>. The page header includes the FOJP and NAV RISK logos, and a navigation menu with options like Home, Questionnaire, and Reports. The main content area displays the 'Finish' step of a questionnaire. It features a dropdown menu for 'Clients' (FOJP Service Corporation), 'Program Year' (2012-2013 Automobile), and 'Policy' (NQAUTOA400002012S-02). A 'Welcome cperkins' message is visible in the top right corner. The main content area contains a red warning: 'Read the agreement below and click on Submit to proceed.' Below this, there is a paragraph of text explaining the final submission process. A text box labeled 'Comments for Insurance Services:' contains the text: 'Cheryl I have added a vehicle, ID card and binder.' At the bottom of the main content area, there are two buttons: 'Submit' and 'Authorize'. The footer of the page includes the FOJP logo and the text 'NavRisk® is a Trademark of DAVID Corporation (2012)'. The browser's status bar at the bottom shows 'Local intranet | Protected Mode: Off' and a zoom level of 100%.

Subject Matter Experts

If you have a question while going through any of the steps in this manual please contact the following subject matter expert:

- Automobile/Abstract/Claims/ID Cards – Cheryl Perkins –212.891.0842– pcrook@fojp.com
- Boiler & Machinery Items – Derrick Hodge – 212.891.0809 – dhodge@fojp.com
- Business Travel Accident – Charlie Ferguson – 212.891.0739 – cferguson@fojp.com
- Commercial Crime – Charlie Ferguson – 212.891.0739 – cferguson@fojp.com
- Directors & Officers – Charlie Ferguson – 212.891.0739 – cferguson@fojp.com
- Disability Coverage – Charlie Ferguson – 212.891.0739 – cferguson@fojp.com
- Fiduciary Liability – Charlie Ferguson – 212.891.0739 – cferguson@fojp.com
- General Liability Coverage – Charlie Ferguson – 212.891.0739 – cferguson@fojp.com
- Property Coverage – Charlie Ferguson – 212.891.0739 – cferguson@fojp.com
- Special Coverage's/Stand Alone Policies – Charlie Ferguson – 212.891.0739 – cferguson@fojp.com
- Workers Compensation Coverage – Peggy Crook – 212.891.0842 – pcrook@fojp.com
- NavRisk Related Items – Chris Balestra – 212.891.0876 – cbalestra@fojp.com



APPENDIX

Appendix I: List of Reports

- Boiler & Machinery Schedule – Lists boilers and machinery exposures.
- Census Schedule – Employee count by quarter for disability policy.
- Client Acceptance Form – Reviewed and signed as part of the individual /special coverage renewal process.
- Flood Schedule – Lists properties on the FEMA flood policy.
- Foreign Package Assets – Lists physical assets located in a foreign country.
- Foreign Package Trips – Lists trips to foreign countries.
- General Liability Activity Schedule (LTCF & Agency only) Lists Client's GL activity.
- General Liability Employee Schedule (LTCF & Agency only) Lists Client's full and part time by employee type.
- Pollution & Tank Schedule – Lists pollution and tank exposures.
- Property Schedule – Lists building exposures.
- Schedule of Insurance – Lists policies.
- Vehicle Schedule – Lists vehicles.
- Workers Compensation Payroll Schedule – Lists payroll for current and prior year.

Appendix II: List of Special Coverages

- Disability
- Event Coverage & Cancellation
- Excess General Liability
- Excess General Liability (Oil & Gas)
- Excess Professional Liability
- Excess Professional/General Liability
- Excess Sexual Abuse & Molestation Liability
- Fiduciary Liability
- Fine Arts
- Flood
- Foreign Medical Malpractice Liability
- General Liability
- General Liability Oil & Gas
- Healthcare Professional/General Liability
- Healthcare Provider Prof Liability
- Independent Adjuster Bond
- Internet Professional Liability
- Lawyers Professional Liability
- Managed Care Professional Liability
- Media Professional
- Medicare Bond
- Miscellaneous Errors & Omissions Liability – Agents/Brokers
- Miscellaneous Professional Liability
- Plate Glass
- Professional/General Liability
- Professional/General Liability Primary ALAE
- Prop Ded Buy Back
- Property/Boiler & Machinery
- Public Official Bond
- Resident's Personal Funds Trust Bond
- Workers' Compensation
- Workers' Compensation & Employer's Liability (NJ)
- Workers Compensation & Employer's Liability (PA)