



STATE OF NEW JERSEY

**SCHOOLS DEVELOPMENT AUTHORITY**

## **Section 24**

# **Insurance**



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## I. Insurance Overview

Construction contractors carry several types of insurance for their company and employees, and some contracts require proof of insurance for all project participants, including subcontractors. With the Insurance module, you can conveniently store information about relevant insurance policies for all project participants, including worker's compensation and bonding.

## II. Add New Insurance Documents

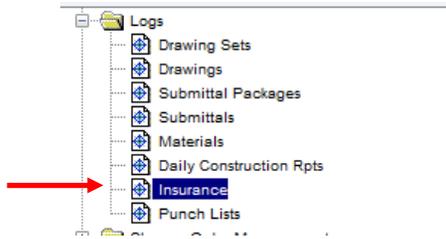
1. Once logged into Primavera, the Contract Manager Control Screen appears (as shown).



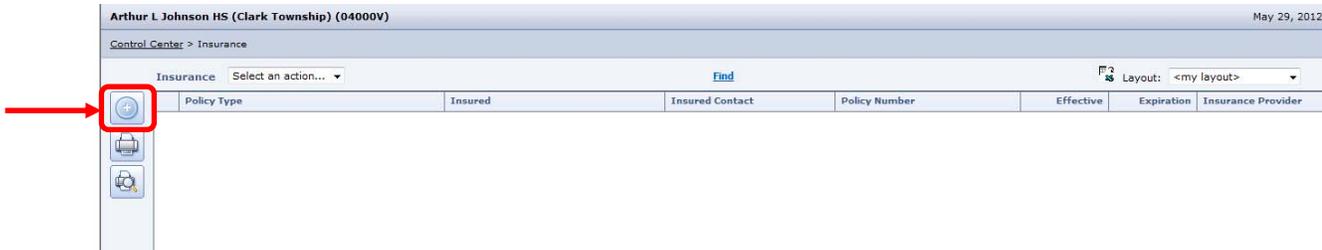
2. Select your desired project.



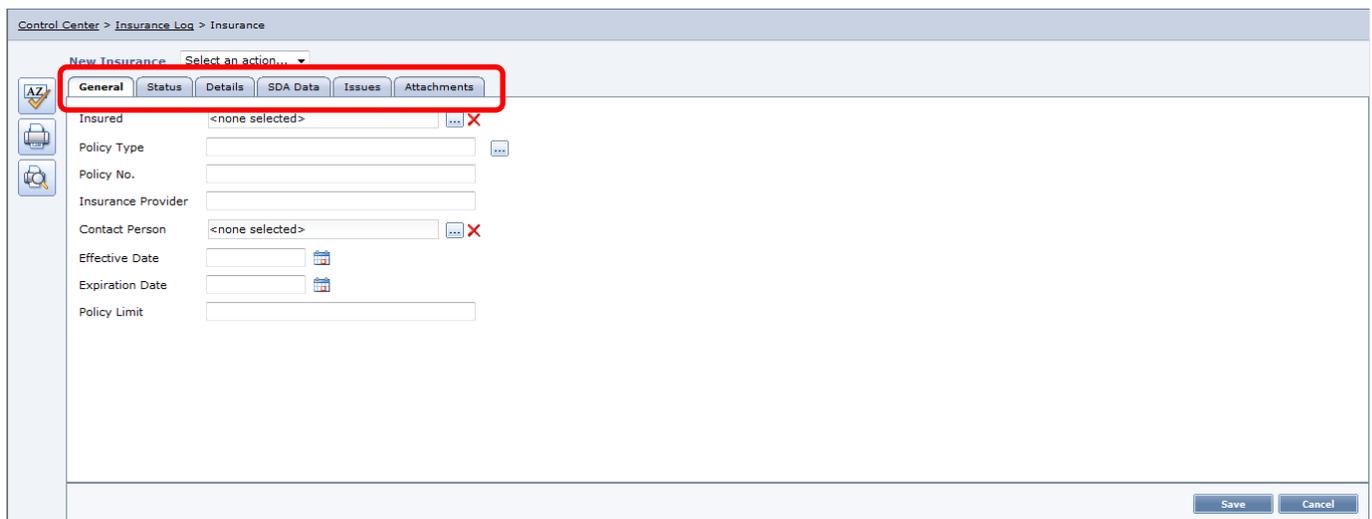
3. Open the **Logs** folder (a list of modules will display) and select **Insurance**.



4. The **Insurance log view** displays. Click the **Add Document** button to add a new Insurance document.



5. The Insurance document will display. Click the applicable tab to enter information on one of the sections of the document.



## A. General Tab

Control Center > Insurance Log > Insurance

New Insurance Select an action...

General Status Details SDA Data Issues Attachments

Insured <none selected>

Policy Type

Policy No.

Insurance Provider

Contact Person <none selected>

Effective Date

Expiration Date

Policy Limit

- **Insured** – Click the **select button** to choose the NJSDA.
- **Policy Type** – Click the **select button** to choose the type of insurance policy. Choices include Automobile, Bid Bond, Errors and Omissions, General Liability, Other, Performance Bond, Professional Liability, Umbrella and Workers Compensation.
- **Policy No.** – Enter the insurance policy number (36 character field).
- **Insurance Carrier** – Enter the name of the insurance carrier (36 character field). Note: If the **select button** is chosen for the Contact Person, the name of the insurance carrier will automatically populate.
- **Contact Person** – Click the **select button** to choose the contact name for the insurance carrier.
- **Effective Date** – Click the **calendar icon** to select the date this policy goes into effect.
- **Expiration Date** – Click the **calendar icon** to select the date this policy expires.
- **Policy Limit** – Enter the maximum insured limit for this policy (36 character field).

An example of a completed section is shown:

Control Center > Insurance Log > Insurance

New Insurance Select an action...

General Status Details SDA Data Issues Attachments

Insured New Jersey Schools Development Auth To Be Determined

Policy Type Workers Compensation

Policy No. WC1234

Insurance Provider Chicago Title Insurance Company

Contact Person Rich Barrington

Effective Date Jan 1, 2012

Expiration Date Dec 31, 2012

Policy Limit \$100,000

## B. Status Tab



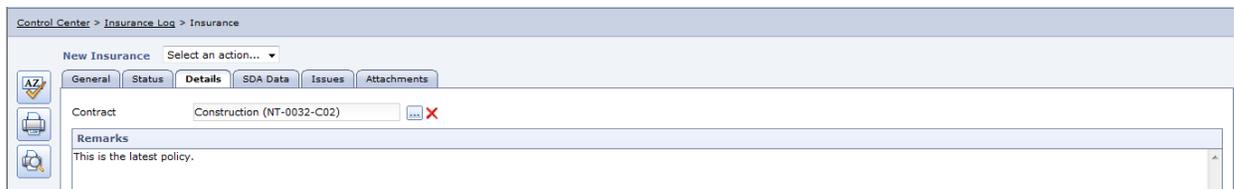
- **Ball in Court** – If desired, a responsible party can be set for this document by clicking the **select button**.
- **Priority** – **Normal** is the default, can be changed to **High** or **Low** as necessary.
- **Status** – **New Item** is the default, can be changed as necessary.

## C. Details Tab



- **Contract** – You **must** click the **select button** next to the field to choose an associated contract. This is a required entry.
- **Remarks** – Enter any applicable comments.

An example of a completed section is shown.



## D. SDA Data Tab

The screenshot shows the 'SDA Data' tab selected in the 'New Insurance' form. The 'Body of Letter' field is empty. Below it, several fields are visible with checkboxes and date pickers:

Cancellation Alerts	<input type="checkbox"/>
Reinstatement Date	<input type="text" value=""/>
Policy Limits	<input type="checkbox"/>
Expiration Dates	<input type="checkbox"/>
Additional Insured Language	<input type="checkbox"/>
Policy Expiration Alerts	<input type="checkbox"/>
Cancellation Date	<input type="text" value=""/>
SIR Deductables (\$)	<input type="text" value="0.00"/>
Broker Information	<input type="text" value=""/>

- **Body of Letter** – Will be populated with standard language. **Note:** once the document is saved, this field will expand to the full width of the screen.
- **Cancellation Date** – Click the **calendar icon** to select the date the policy was cancelled
- **Reinstatement Date** – Click the **calendar icon** to select the date the policy was reinstated
- **Policy Limits** – Click the **checkbox** if policy limits are incorrect
- **Expiration Dates** – Click the **checkbox** if expiration dates are incorrect
- **Additional Insured Language** – Click the **checkbox** if additional insured language is required
- **Policy Expiration Alerts** – Click the **checkbox** if policy alerts are needed
- **Cancellation Alerts** – Click the **checkbox** if cancellation alerts are needed
- **SIR Deductables (\$)** – Enter the deductible amount of the self insured retention
- **Broker Information** – Enter the name of the broker

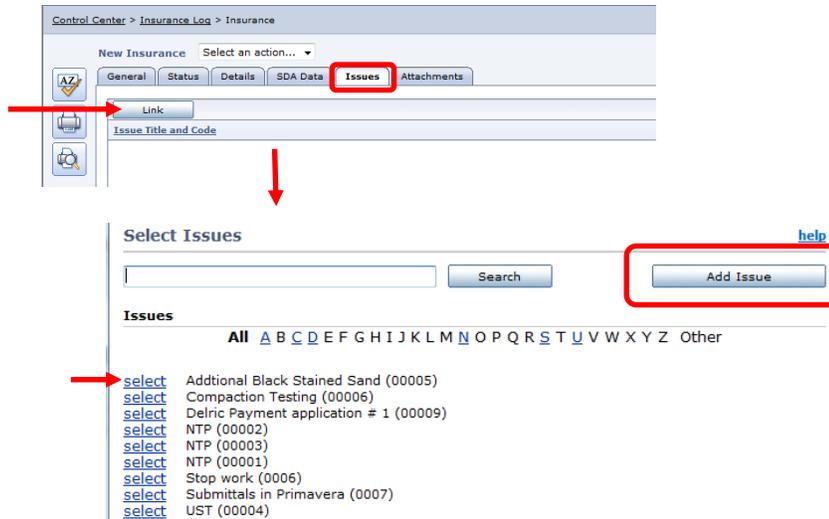
An example of a completed section is shown.

The screenshot shows the 'SDA Data' tab with the following completed fields:

Cancellation Alerts	<input checked="" type="checkbox"/>
Reinstatement Date	<input type="text" value="May 1, 2012"/>
Policy Limits	<input checked="" type="checkbox"/>
Expiration Dates	<input checked="" type="checkbox"/>
Additional Insured Language	<input checked="" type="checkbox"/>
Policy Expiration Alerts	<input checked="" type="checkbox"/>
Cancellation Date	<input type="text" value="Mar 12, 2012"/>
SIR Deductables (\$)	<input type="text" value="500.00"/>
Broker Information	<input type="text" value="Smith and Sons, Inc"/>

Buttons for 'Save' and 'Cancel' are visible at the bottom right of the form.

## E. Issues Tab



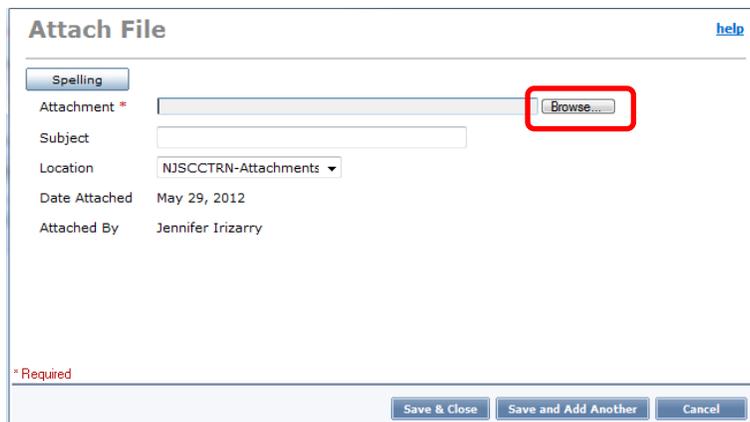
- If this policy relates to an Issue that was previously entered in the Issues log, it can be linked to this Insurance document. Click the **Link** button and choose the desired issue from the dialog box. You can also click the **Add Issue** button to create a new issue, however, you will need to return to the Issues module to populate additional fields relating to the Issue.

## F. Attachments Tab

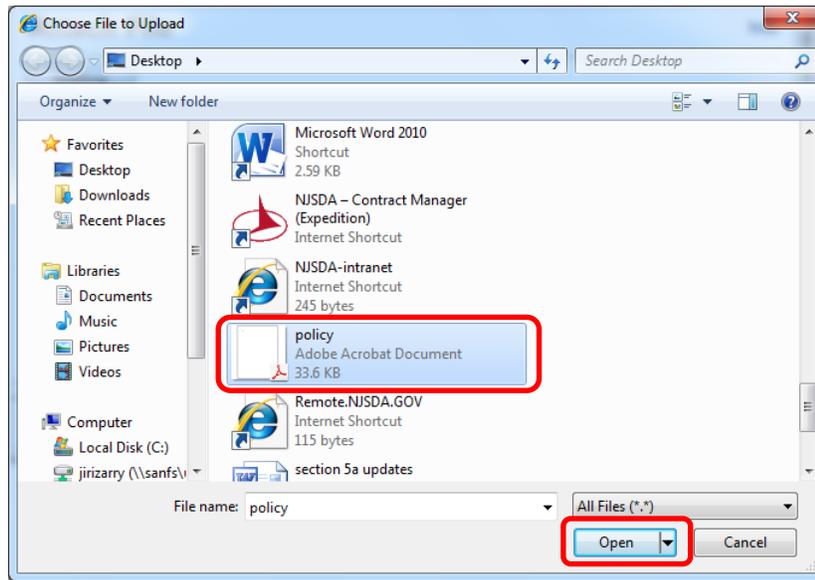
- To attach supporting documentation, click the **Attach File** button.



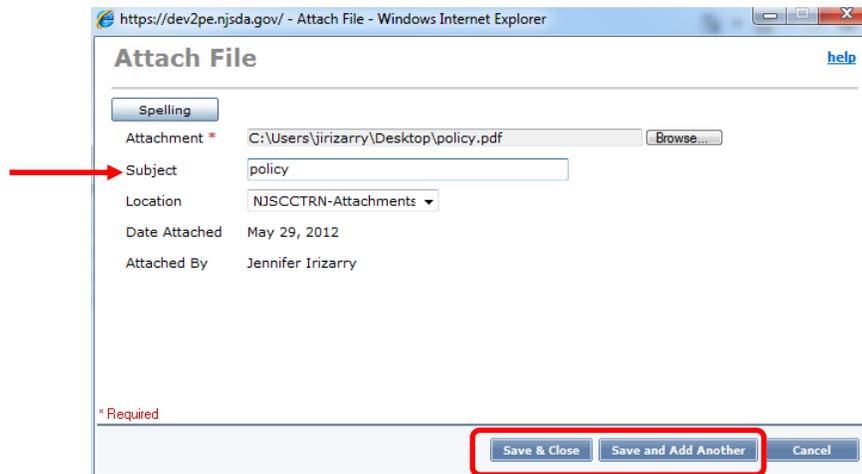
- Click the **Browse** button to navigate to the document you wish to attach.



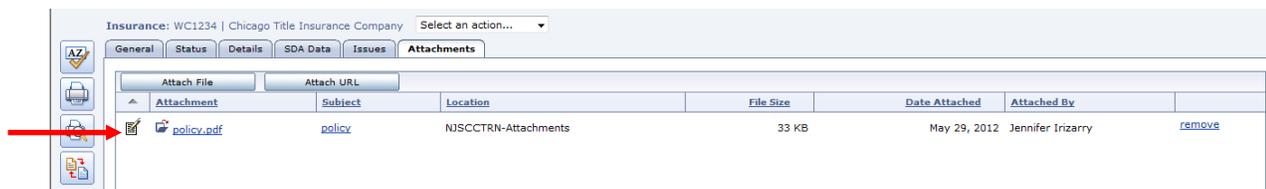
- Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



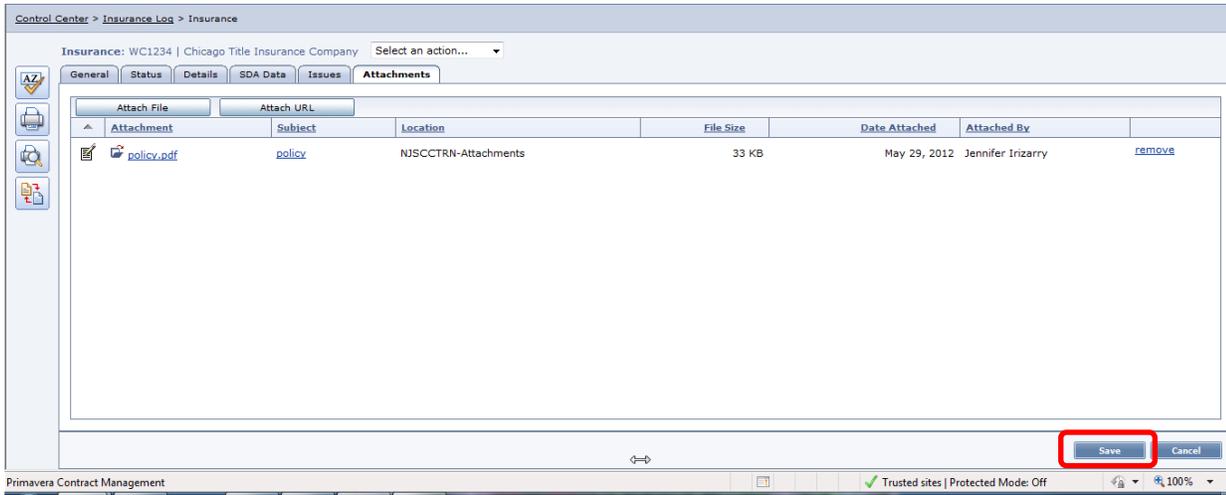
- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



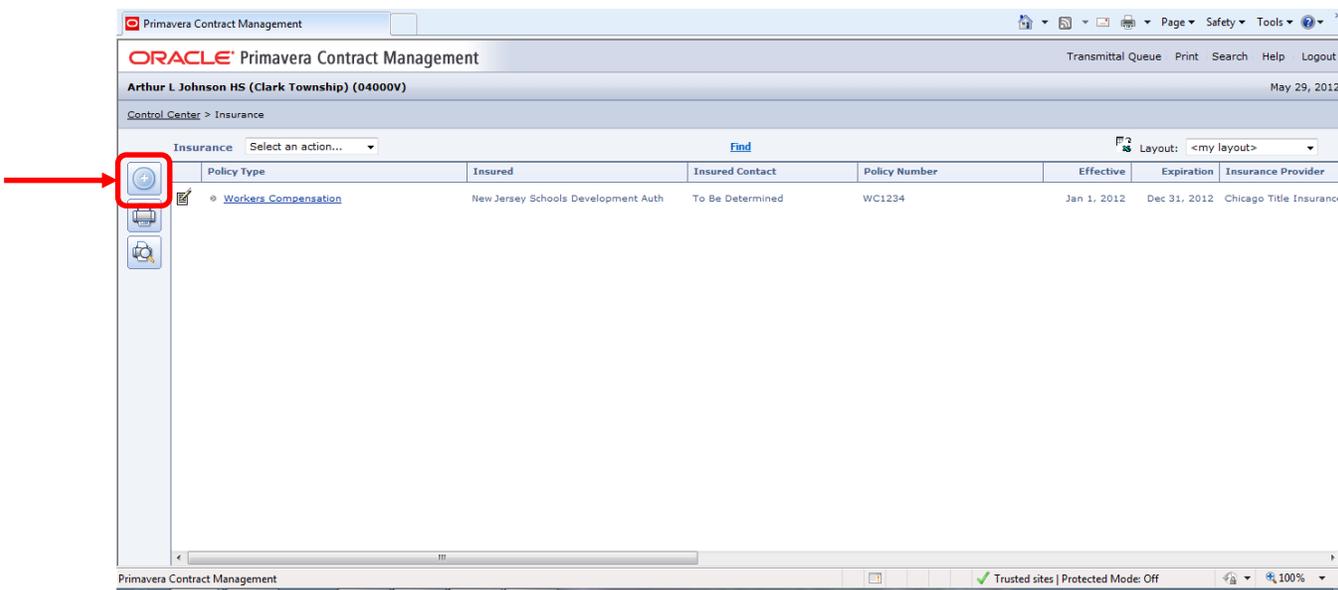
- The attached file will display in the **Attachments** section.



When all fields are completed, click the **Save** button at the bottom of the document window.



To add additional policies, open the Insurance log, click the **Add Document** button, and follow the entry processes starting on page 4. As Insurance policies are entered, they will be automatically linked to Payment Requisitions and Contracts.



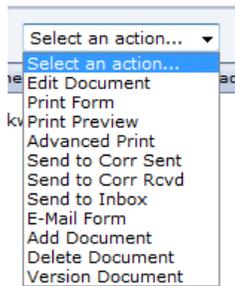
### III. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

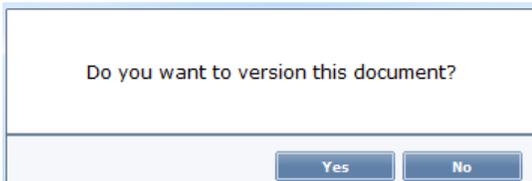
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

#### A. Create a Document Version

1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.



3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.



## IV. Generate a Subsequent Insurance Document

This procedure outlines how to create a new Insurance document from a previous Insurance document. This will allow all information entered on the original document to be copied over into the new document.

**Important:** This process will **automatically close** the previous Insurance document. Therefore, it should only be used if you are updating policy information.

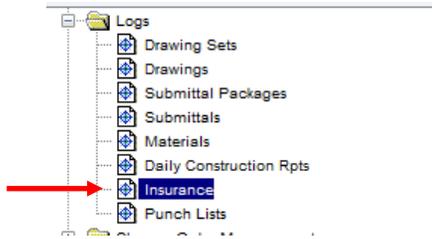
1. Once logged into Primavera, the Contract Manager Control Screen appears (as shown).



2. Select your desired project.



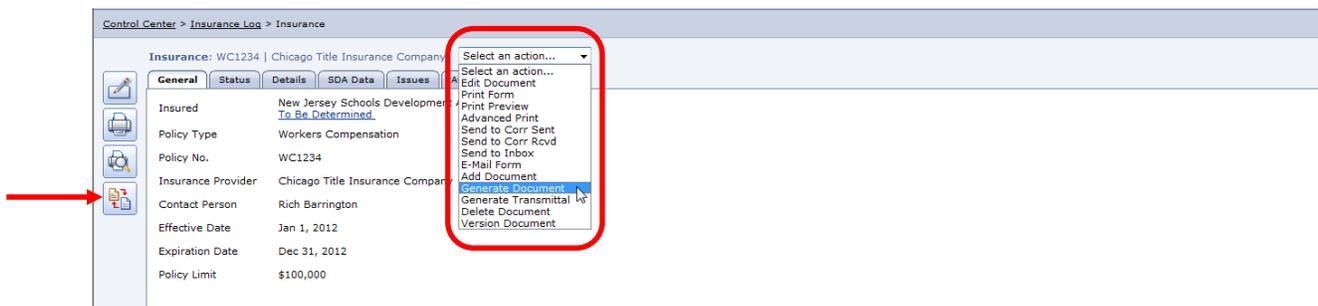
3. Open the **Logs** folder (a list of modules will display) and select **Insurance**.



4. The **Insurance log view** will display. Locate your desired Insurance document and click the **blue title link** to open it.



5. With the Insurance document open, click the drop down box on the **Select an action** menu on the top of the screen. Choose **Generate Document** from the menu options. You can also click the **Generate Document button** on the left side of the screen.



- The **Generate Insurance** dialog box will display.

**Generate Insurance**

Effective Date

Expiration Date

Link the new Insurance to the same Issues as the original?  
 yes  no

Link the new Insurance to the same Attachments as the original?  
 yes  no

- The **Effective Date** and the **Expiration Date** will reflect the same dates as the previous Insurance document. If this is incorrect, click the **calendar icon** to change the dates. In the example shown, the dates were changed.

**Generate Insurance**

Effective Date

Expiration Date

Link the new Insurance to the same Issues as the original?  
 yes  no

Link the new Insurance to the same Attachments as the original?  
 yes  no

- The **Yes/No** options for the **Issues** and **Attachments** questions will default to **yes**. If the new Insurance document should be linked to the same Issues or Attachments as the original, leave the default to yes, otherwise click the **no** option to change it. In the example shown, the no option was selected for both questions. When all options have been selected, click the **Finish** button to generate the new Insurance document.

**Generate Insurance**

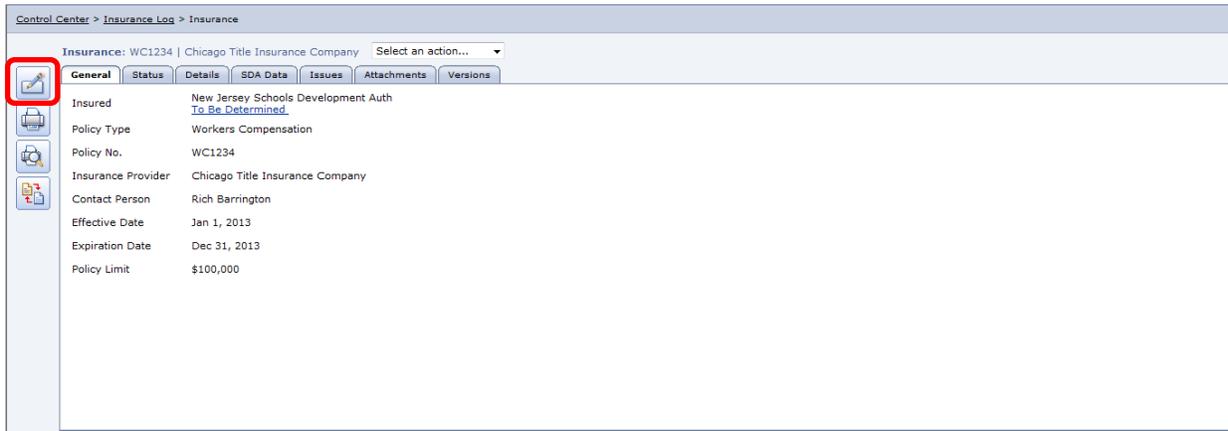
Effective Date

Expiration Date

Link the new Insurance to the same Issues as the original?  
 yes  no

Link the new Insurance to the same Attachments as the original?  
 yes  no

- The new Insurance document displays. Click the **Edit Document** button on the left side of the screen to edit any field using the previously described processes. Save your changes when complete.



- As noted, this process automatically closes the previous Insurance document. To verify this, return to the Insurance log view. You will see both documents listed. Click on the **blue title link** of the previous Insurance document to open it.



- The Insurance document will display. Notice that the **Status field** in the **Status section** now displays as **Closed**.



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## V. Insurance Alert Subscription

Alerts allow a user to receive a notification when a document is due or past due. The notification will display on the Control Center screen in the Alerts box. The Alerts box will provide a direct link to the applicable Contract Manager document.

Should you require any assistance with alerts, please contact the SDA Contract Manager help desk at [pehelpdesk@njsda.com](mailto:pehelpdesk@njsda.com).