

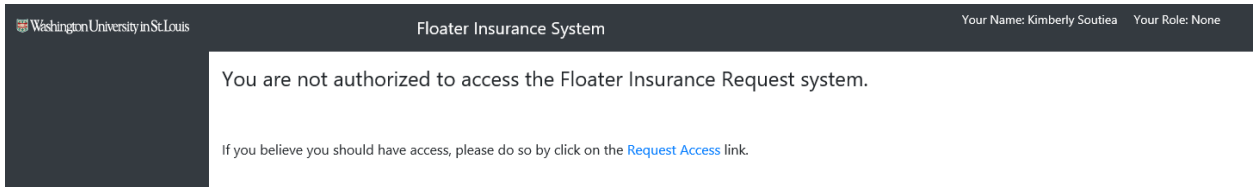
Floater Insurance Training Manual

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Creating an Access Request - <https://floaterinsurance.wustl.edu/>

1. Upon your first visit to the site, you will most likely get a screen saying you are not authorized to access the system. To request access, click on the “Request Access” link



2. Upon clicking on the “Request Access” link, a form will display with some fields pre-populated based on your login

To request access to this system, please complete the form below. Some values may be auto-populated so make any corrections that you see necessary

Please complete all information below before submitting your request.

All fields are required below, including the list of department numbers for which you will be submitting insurance requests.

First Name: Last Name: Email:

Employee Id (read only): Phone Number:

Please include a note to describe your request for access.

Supervisor Name: Supervisor Email: Supervisor Phone:

Below are the departments for which the user can add insurance requests:
Select Department Number To Add: Departments to Add to User:

Please include a the department(s) for which you will be submitting requests.

#	Department Number	Department Name	Action

3. Please note that your email and/or phone # may not be pre-populated. Be sure to populate those fields with the correct information. All fields are required
4. In the "Departments to Add to user," you need to list the department numbers for which you will be requesting insurance (assets under \$5,000)
 - a. You will need to know the department number and enter it in this field
 - b. A list of department numbers will appear once you begin entering a number
 - i. Locate the department, then click on "Add"

Below are the departments for which the user can add insurance requests:

Select Department Number To Add: Departments to Add to User:

Please include a the department(s) for which you will be submitting requests.

- ii. The department will display at the bottom of the screen. You can add multiple departments

Please include a the department(s) for which you will be submitting requests.

#	Department Number	Department Name	Action
1	<input type="text" value="0111"/>	<input type="text" value="CHAIRMAN BD OF TRUSTEES"/>	<input type="button" value="Delete"/>

- iii. If you added the wrong department, click on "Delete"
 - c. If you do not see the department number that you need, please email insurance@wustl.edu
 - d. Once you have added all of your departments, click on "Request Access"

Please include a the department(s) for which you will be submitting requests.

#	Department Number	Department Name	Action
1	<input type="text" value="0111"/>	<input type="text" value="CHAIRMAN BD OF TRUSTEES"/>	<input type="button" value="Delete"/>
2	<input type="text" value="0116"/>	<input type="text" value="RESEARCH OFFICE"/>	<input type="button" value="Delete"/>

- e. You will receive a confirmation screen as well as a confirmation email

Your request for access was successfully submitted. You will be notified via email when your request is processed.

Thank you for using the Insurance Request system.

- f. Upon clicking "Request Access," an email will go to the insurance department informing them that they have a new access request
- g. You will receive an email once your access request has been approved

Navigating the site

1. Once your access has been approved, you can access the site - <https://floaterinsurance.wustl.edu/>
2. Any messages from the Insurance department will be displayed at the top of the page
3. The left navigation will display links to your user dashboard, insurance requests, and billing

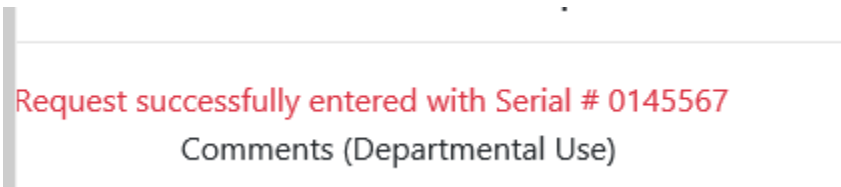
Insurance Requests – Creating New Requests

1. Once your access has been approved, you can log into the site to request insurance
2. When you login, you will see the following screen

The screenshot displays the user interface of the Floater Insurance System. At the top, the header includes the Washington University in St. Louis logo and the system name 'Floater Insurance System', along with the user's name 'Your Name: Kin'. A prominent blue notification banner at the top center contains the message: '1 Please be sure to enter your expiration dates soon'. On the left side, a dark navigation sidebar is visible, with 'Insurance Requests' and 'Create New' highlighted by red rectangular boxes. The main content area features a 'Create Request' button, also highlighted with a red box. Below this, the heading 'Show Insurance Requests for your Department(s) :' is followed by a dropdown menu currently set to '--Please Select--', which is also highlighted with a red box.

3. The drop-down will only show the department(s) that you have access to
4. To create an insurance request for your department(s), in the left navigation panel click on "Insurance Requests," then click on "Create New"

5. Online form fields:
 - a. Comments (Department Use) 255 character limit – *this is for you to add miscellaneous comments about the device you are insuring*
 - b. Fund Number – 32 character limit
 - c. Department Number (*will only show the departments you have access to*)
 - d. Effective date – (*if you are using IE, the right arrow on the calendar doesn't appear well, but it's there and does function*)
 - e. Expiration Date - (*if you are using IE, the right arrow on the calendar doesn't appear well, but it's there and does function*)
 - f. Description of the Asset(s) 512 character limit – *formal description*
 - g. Purchase Date - (*if you are using IE, the right arrow on the calendar doesn't appear well, but it's there and does function*)
 - h. Serial Number – 128 character limit
 - i. Manufacturer – 255 character limit
 - j. Model – 128 character limit
 - k. Item Cost – numbers only
6. If you only have one item, you can click on “Submit New Request.” If you have multiple items with the same information except serial number, click on “Submit and Duplicate This Request.” This will duplicate everything except the serial number on a new request
7. Upon submitting a duplicate insurance request, you will get the following message on the screen:



8. If you only submit one request, you will be directed to a report showing your new requests

Edit	Department #	AssetDescription	SerialNumber	Status	EffectiveDate	ExpirationDate	Cost	InsuranceCost	CreatedDate	CreatedByUserName	PurchaseDate	Approved	Ap
	0111	The foot warmer is black	0145567	New	9/22/2018	10/19/2018	500.00		8/15/2018 2:18:31 PM	Soutiea, Kimberly	9/11/2018	<input type="checkbox"/>	
	0111	The foot warmer is black	888888	New	9/22/2018	10/19/2018	500.00		8/15/2018 2:19:39 PM	Soutiea, Kimberly	9/11/2018	<input type="checkbox"/>	

Showing 1 to 2 of 2 entries

Insurance Request Approvals, Denials

1. Once the coordinator approves your insurance request(s), you'll receive an email. You can click on the link in the body of the email to change the expiration date, if needed

Kimberly Soutiea,

Your insurance request was approved.

[Should you need to expire your coverage click on this link and change the expiration date.](#)

Thank You,

[WUSTL Floater Insurance Department](#)

2. If the coordinator denies your insurance request(s), you'll receive an email with a link to the request and the coordinator comments. You can make the needed updates and save them in order to have the coordinator review the requests again

Kimberly Soutiea,

Your insurance request was denied and needs attention.

Please login and review the comments section at the bottom of the Insurance Request.

[Login and View Your Insurance Request](#)

Thank You,

[WUSTL Floater Insurance Department](#)

- a. When clicking on the link, you will go to the insurance request page. Comments as to why the request was denied will display at the bottom. You can make the needed changes and click on "Save," which will resubmit the request.

Department Number: 0114 Fund Number: 66667

Manufacturer: Dell Model: Ultimotor Serial Number: 222222987

Purchase Date: 8/21/2018 12:00:00 AM Effective Date: 8/23/2018 12:00:00 AM Expiration Date:

Status: Denied Cost: 500000.00 Previous System Id:

Created Date: 8/22/2018 4:47:17 PM

Last Modified By User: 8/22/2018 4:49:15 PM Admin Last Modified: Date Last Modified By Admin: 8/22/2018 4:51:28 PM

Comments

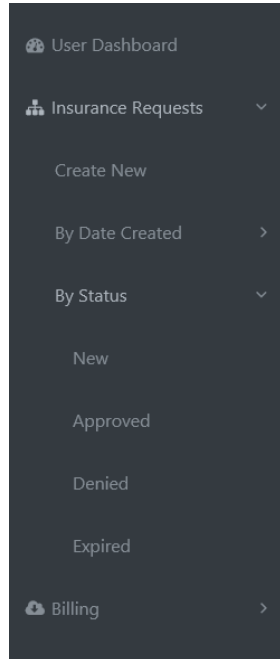
Row	Created Date	Created By	Comment	Active
1	8/22/2018 4:51:27 PM	Kondis Nikos	Still Not Good Enough	<input checked="" type="checkbox"/>

Buttons: Back to List, Save Changes, Cancel Changes, Delete

- b. If you want to add a comment, enter the text into the box and click on "Add Comment." Then, save the changes
- c. Once you save the changes, the status of the request is "New."

Insurance Requests – Viewing Request Statuses

1. You can view reports by clicking on “Insurance Requests” in the left navigation
 - a. You have several filters you can use:
 - i. By date created
 - ii. By status
 1. New
 2. Approved
 3. Denied
 4. Expired



Billing

1. Billing – use this to see a summary report or a detailed report of your bill
 - a. Select the “Billing Period” (Fiscal Year)
 - b. Select the department (will only display the departments you have access to)
 - c. Click on either “View Billing Summary” or “View Billing Detail”

Billing Actions

Select Billing Period:

Select Department:

[View Billing Summary](#) [View Billing Detail](#)

- i. The Billing Summary is a high-level overview
- ii. The Detail report give a more in-depth view of the billing