

# Converting an Existing Policy (Version 3.x) to Policy Setup 4.0

## Before Getting Started

Your Oceanwide account team representative will advise you when your site is ready so you can begin converting policies, and will also identify any specific policies that are not ready for conversion.

## The Conversion Process

**1** Navigate to **Policy Setup Beta** via the Main Menu (as labelled pre-release) or **Policy Setup** as it will be called following the 'pilot' phase.

**2** Search for an existing policy. You can convert a policy if:

- You have the right to edit it
- A company within your organization has created it and is set as '**Policy Owner**' (see **Profile** screen)

**3** Select a policy hyperlink from the search results

**4** Read about the automated conversion process

- Click [**Return to Search**] to return to the 4.0 **Policy Search** screen

**5** Click [**Convert**] to convert your policy

- The system converts every endorsement and renewal record for the selected policy to 4.0. The process runs in the background; you cannot access the policy immediately.
- The policy's status remains unchanged

**6** Review your policy

- **Definition** screen - Set automatically by the system based on the policy's saved data
- **Shipment Screen Customization** screen - Some available settings have changed
- **Review/Confirmation** screen – indicates if there are data setup conflicts to resolve



Use your 4.0 policy!

- All new and existing shipments will be managed via the 4.0 **Shipment Certificate** screen
- All subsequent policy administration for that policy is to be done via the 4.0 **Policy Setup** module