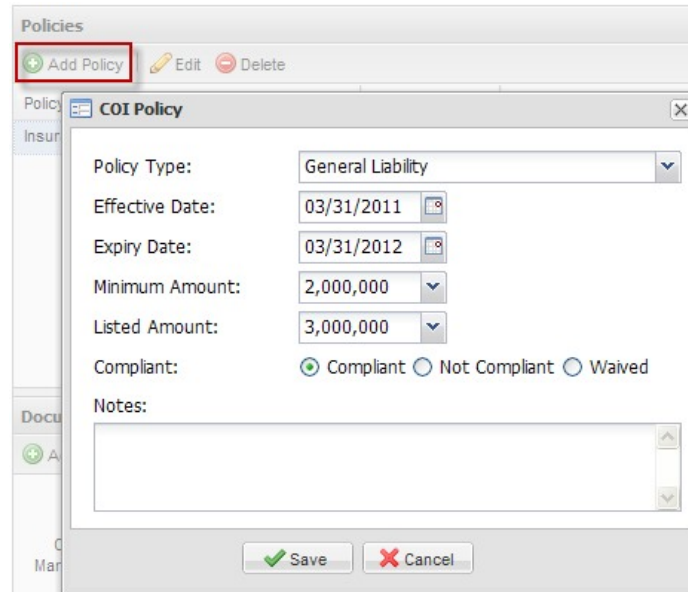






## Adding a Policy



1. Click **Add Policy**. The COI Policy screen is displayed.



The screenshot shows a software interface for adding a policy. At the top, there is a 'Policies' header with three buttons: 'Add Policy' (highlighted with a red box), 'Edit', and 'Delete'. Below this is a 'COI Policy' form window. The form contains the following fields:

- Policy Type:** A drop-down menu with 'General Liability' selected.
- Effective Date:** A date field with '03/31/2011' and a calendar icon.
- Expiry Date:** A date field with '03/31/2012' and a calendar icon.
- Minimum Amount:** A drop-down menu with '2,000,000' selected.
- Listed Amount:** A drop-down menu with '3,000,000' selected.
- Compliant:** Three radio buttons: 'Compliant' (selected), 'Not Compliant', and 'Waived'.
- Notes:** A large text area for entering additional information.

At the bottom of the form, there are two buttons: 'Save' (with a green checkmark icon) and 'Cancel' (with a red X icon).

2. Enter the following information:
  - **Policy Type:** select a type from the drop-down menu, or enter in the first three characters of the policy type name and choose from a list of possible matches.
  - **Effective Date:** click the calendar icon (  ) and use the calendar interface provided to select the starting date for the policy's coverage.
  - **Expiry Date:** by default, this is set to expire one year after the effective date. You can manually adjust this by clicking the calendar icon (  ) and using the calendar interface provided.
  - **Minimum Amount:** use the drop-down or manually enter the minimum dollar amount for compliance.
  - **Listed Amount:** use the drop-down or manually enter in the actual dollar amount of coverage provided by the policy.
  - **Compliant:** indicates whether the policy is **Compliant** or **Not Compliant**. The default setting is determined based on whether or not the **Listed Amount** is equal to or greater than the **Minimum Amount**. You can also select **Waived** if you choose to waive the requirements for this policy.
  - **Notes:** enter any relevant additional information concerning the policy.
3. Click **Save**.