



## OSIP Operations Manual

### Contents

OSIP Operations Manual.....	1
Broker Admin Instructions .....	2
Logging in and registration .....	2
Submissions.....	7
Archives.....	23
Manage Brokers .....	25
Manage Email templates (advanced) .....	30
Broker instructions.....	34
Submissions.....	37
Archives.....	40
My Profile .....	41



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## Broker Admin Instructions

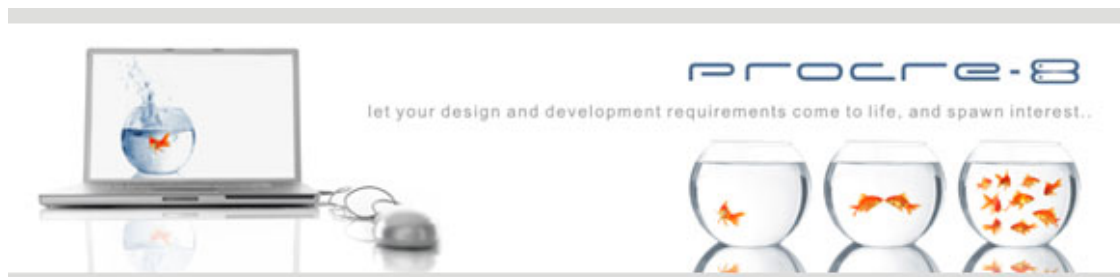
**Broker vs Broker Admin Explained:** The broker admin can have many brokers under him/her. This means when a broker under a particular broker admin submits an RV7 the broker admin has to approve the document first, before it is submitted for everyone to see. In contrast if the broker admin submits a RV7 form it does not need any approval and will be directly published.

## Logging in and registration

**Introduction:** This step by step manual will explain how to successfully register and log into the osip website.

Illustrated below is the step by step process:

1. Firstly please visit <http://www.osip.co.za>. Once you are there please log in using the user name and password that you were provided. Should you have not received one please register first by pressing register.



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Username  
  
Password  
  
☐ Remember me  
  
[Lost Password?](#)  
[No account yet? Register](#)

RV7



### Information

Dear Visitor,

We need your help to test.

So please log in and test the system. If you do not have a user name or a password for testing please send an email to [phil@procre8.co.za](mailto:phil@procre8.co.za) or phone 011-726-8991 (ask for philipp).

You can also contact or Ursula Moosa from SAIA on 011-726-5381 [Ursula@saia.co.za](mailto:Ursula@saia.co.za) or Tshidi Khutlapey from the FSB on 012-422-2982 [tshidik@fsb.co.za](mailto:tshidik@fsb.co.za) should you have any questions.

### Web Browser

Upgrade you online experiance! If you are using Internet Explorer 6 or lower, you should upgrade.

A few reasons to upgrade are web page compatibility, security and new technology advancements.

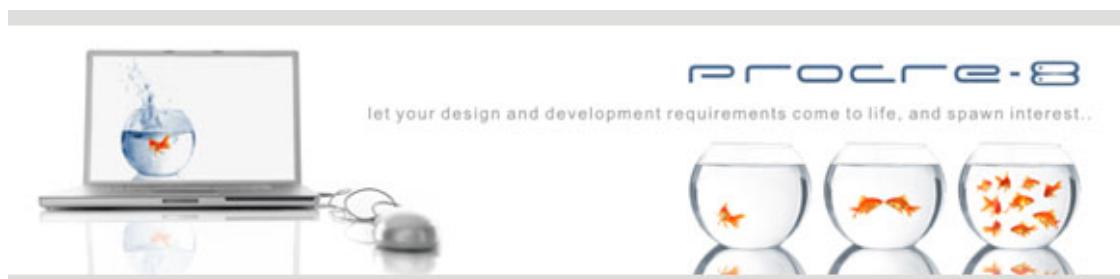
Upgrade is **FREE**.

Click on the images to upgrade.



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2. On the registration page please fill in all the fields and press send registration when you are done.



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Username  
 Password  
☐ Remember me  
  
[Lost Password?](#)  
 No account yet? [Register](#)

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### Registration

Fields marked with an asterisk (\*) are required.

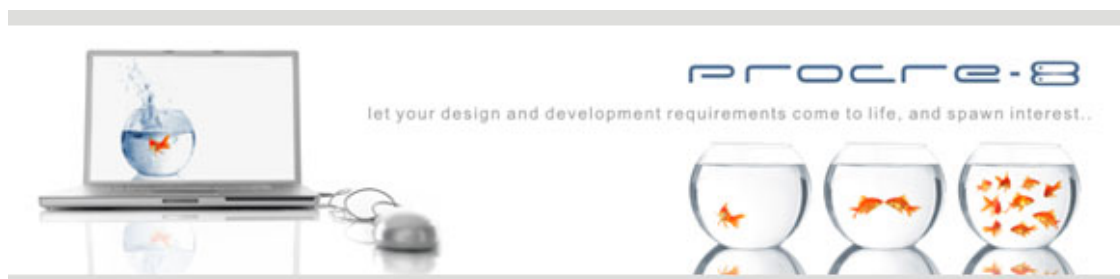
Name: *	Mr. X Broker
Username: *	mx
E-mail: *	mx@procre8.co.za
Password: *	*****
Verify Password: *	*****

### Extended Details

Company Name	X Broker Firm	Required
Type (member or broker)	Broker	Required
telephone	0113354587	Required
cell	0828889965	Required
fax	0113354587	Required
company registration number	2007/11235/002	Required
physical address	3rd road X street Johannesburg	Required

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- You will receive an email that your registration details have been received. Your details will now be cross checked by SAIA and the FSB. After max 48 hours you will be able to log in if the cross check is successful. If there should be any problems you will be contacted by SAIA or the FSB.





*Hello NAME,*

*Thank you for registering at OSIP. Your account is created and will be authenticated by staff usually in 48 hours.*

*After activation you may login to <http://www.osip.co.za> using the following username and password:*

*Username - USER*

*Password - PASS*

4. Once your account is active please enter your details and log in. Once you have logged in you will see the “dashboard”, which consists of “submissions”, “archives”, “my profile”, “manage brokers” and “manage email templates”.



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Hi, broker

[Logout](#)

Dashboard

[Add a new Submission](#)

[Submissions](#) [Archives](#) [My profile](#) [Manage brokers](#) [Manage Email templates](#)

Submitted by	Insured name	Start and end date	Objections	Actions
No submissions found				

<< [Start](#) < [Previous](#) [Next](#) > [End](#) >>

Display #  Results 1 - 20 of 0

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## Submissions

**Introduction:** This step by step manual will explain how to successfully submit and manage your RV7 application as well as the RV7 applications submitted by brokers that are under you.

Illustrated below is the step by step process:

1. To add a new submission please click “add a new submission” on the top right of the page.
2. You will now be taken to page 1 of the two page submission document. This page includes some instructions. Once you have read them please click “agree and continue.”

Hi, broker

Logout

RV7

SAIA

on your side

Add/edit a submission

Submissions Archives My profile Manage brokers Manage Email templates

Instructions for submission

FINANCIAL SERVICES BOARD REPUBLIC OF SOUTH AFRICA  
SHORT-TERM INSURANCE ACT, 1998 (ACT 53 OF 1998)

Page 1 of 2

APPLICATION FOR APPROVAL TO PLACE INSURANCE WITH UNDERWRITERS OTHER THAN SOUTH AFRICAN SHORT-TERM INSURERS AND/OR LLOYD'S UNDERWRITERS IN TERMS OF SECTION 8(2)(d) OF THE SHORT-TERM INSURANCE ACT ("ACT")

**A. Instructions for completion and submission**

Questions must be answered either in full or not applicable ("n/a"), signed  
A provisional application or a fully completed application form to be posted on the OSIP website not less than 15 working days prior to the renewal date.  
Where a Provisional application was submitted at least 15 working days prior to inception of the cover, a final application with detailed information must be submitted not more than 10 working days after the inception of the cover, failing which would result in the application not being considered  
This application must be completed and submitted at least 15 working days prior to the inception of the cover, failing which would result in a penalty being imposed of R50 per day for every day that the application is submitted less than 15 working days before inception of the cover. Penalties will not be imposed if a provisional application is submitted at least 15 working days before inception of cover. Such provisional application must include all details, except for premium related information and the names of all the offshore insurers that will take part in the cover and must be followed by a final application within 10 days after inception of cover. The name of the lead insurer(s) must be submitted.

Please note that the Registrar:  
will only consider a final application; and  
will assume that an applicant who does not submit a final application after it has submitted a provisional application no longer seeks approval.

**B. General information**

This form is required in terms of section 3(2)(a) of the Act read with section 8(2)(d) of the Short-term Insurance Act.  
The form must be accompanied by the fees prescribed by the Registrar in terms of section 3(2)(b)(i) and, where indicated, by the documents required in terms of section 3(2)(b)(ii) of the Act.  
The Registrar, in terms of section 4(2) of the Act, may by notice direct a short-term insurer ("insurer") to furnish the Registrar, within a specified period, with specified additional information or documents.  
The final application will not be considered favourably if it is not supported by a compelling reason(s).

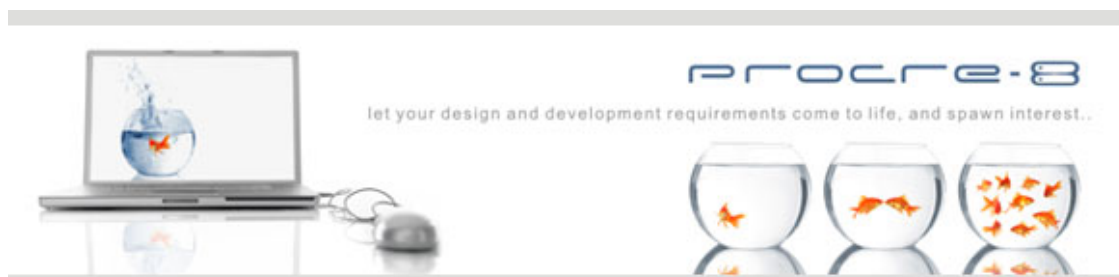
**C. Legal and policy framework**

In terms of section 8(2)(d) of the Short-term Insurance Act no person shall render services as intermediary in relation to a short-term policy, unless -

short-term insurers are the only underwriters in terms of the short-term policy concerned;  
such person is a Lloyds correspondent and Lloyds underwriters are the only underwriters in terms of the short-term policy concerned;  
short-term insurers and Lloyds underwriters through a Lloyds correspondent are collectively the only underwriters in terms of the short-term policy concerned; or  
such person does so with the approval of the Registrar.

The application must set out all the reasons for, and information relevant to, the request.

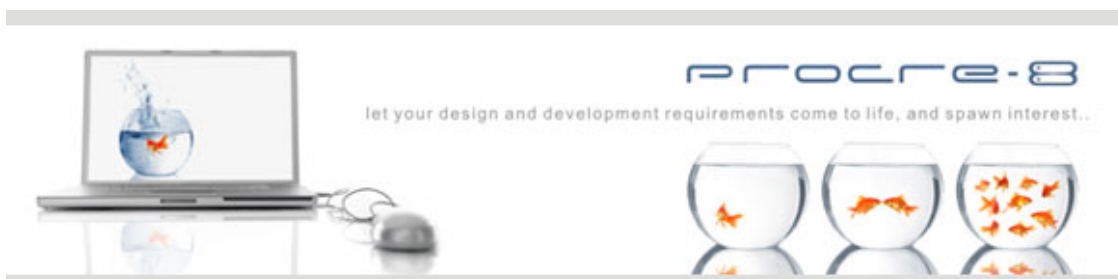
Agree and continue or cancel





3. This will take you to page 2 of the RV7 form. Please fill in all the relevant fields. Fields that have a red \* are compulsory fields and cannot be skipped.
  - a. First section please fill in your name and your company

- b. Number 1: please state the application status (provisional or final)
- c. Number 2: State the address of the intermediary/Lloyds correspondent making the application.
- d. Number 3: You will have to state the names of the insured
- e. Number 4: Asks to describe the business of the insured.





1 \* Indicate the status of this application (Refer to items 5 and 6 of Part A.)

Provisional

2 State the address of the intermediary/Lloyds correspondent making the application

Number 42, Denver Road, Johannesburg (pls ignore this is a test submission for the manual)

3 \* State the name(s) of the insured(s)

Tom Jones Aerflot

(pls ignore this is a test submission for the manual)

4 \* Describe the business of the insured(s)

Aviation

(pls ignore this is a test submission for the manual)

- f. Number 5: Here you have to select the cover required. You can select more than 1 item by holding down ctrl and clicking items with the left mouse button. You can also add your own options if the options.

5 \* Describe the cover required

**TIP: Hold down ctrl while selecting to select multiple item**

Chatterers Liability  
All risk  
Group Personal Accident  
Fiduciary  
Transit  
Agricultural Risk  
Political Risk  
Business Interruption  
Crime  
Jewellers Block  
Aviation  
Homeowners, Household Contents  
Liability  
Engineering  
Marine  
War  
Machinery Breakdown  
Hull  
Third-Party Liability  
Errors and Omissions  
Fire  
Legal Liability  
Bankers Blanket Bond  
Cargo  
Property Liability  
Directors and Officers  
Umbrella Liability  
Environmental Liability  
Company Reimbursement  
Commercial Crime

If the type of cover required is not listed above then [cancel](#)

Add a new option

Sabotage

[add option](#) (will be added to the end of the list)



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5 \* Describe the cover required

**TIP: Hold down ctrl while selecting to select multiple item**

Chatterers Liability
All risk
Group Personal Accident
Fiduciary
Transit
Agricultural Risk
Political Risk
Business Interruption
Crime
Jewellers Block
Aviation
Homeowners, Household Contents
Liability
Engineering
Marine
War
Machinery Breakdown
Hull
Third-Party Liability
Errors and Omissions
Fire
Legal Liability
Bankers Blanket Bond
Cargo
Property Liability
Directors and Officers
Umbrella Liability
Environmental Liability
Company Reimbursement
Commercial Crime
Sabotage

If the type of cover required is not listed above then [click here to add your own](#)

- g. Number6: You are required to state why the you are selecting a cover outside South Africa and what the difference are. You can include a supporting document that will be uploaded by pressing the browse key and selecting it from your computer. In addition to this you are required to state the start and the end date of the insurance.
- h. Number 7: Here you must explain yourself if the difference between the start and the end date is longer than 1 year.



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6 Describe the structure of the cover and the major differences to the cover offered by the South African market and attach supporting documents, if any.

no one in south africa offers this cover  
(pls ignore this is a test submission for the manual)

Supporting documents: C:\Users\PhantomPhon\ Browse...

\* Indicate the proposed **start** date for the insurance

2009-01-23

Date must be in the format YYYY-MM-DD or use the datepicker to help

\* Indicate the proposed **end** date for the insurance

2011-05-20

Date must be in the format YYYY-MM-DD or use the datepicker to help  
The period should ordinarily not be longer than 1 year. Any period longer than 1 year must be properly motivated.

7 If the proposed period of cover is longer than 1 year, please explain the motivation

We need a long term cover because of factor X and Y.  
(pls ignore this is a test submission for the manual)

- i. Number 8: Requires you to state details of the underwriters. You do this by pressing “add an underwriter” and filling out the required fields.

8 State the name(s), postal address(es), contact person(s) and telephone number(s) of the offshore insurer with whom the intermediary is applying to place insurance cover

Name	Address	Contact person	Phone	Actions
No underwriters found				
<a href="#">Add an underwriter</a>				



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8 State the name(s), postal address(es), contact person(s) and telephone number(s) of the offshore insurer with whom the intermediary is applying to place insurance cover

Name	Address	Contact person	Phone	Actions
No underwriters found				
<p><b>* Name</b></p> <input style="width: 100%;" type="text" value="Company Name XYZ"/>				
<p><b>* Address</b></p> <input style="width: 100%;" type="text" value="23 wine road, johannesburg"/>				
<p><b>* Contact person</b></p> <input style="width: 100%;" type="text" value="Mr Toot"/>				
<p><b>* Business phone number</b></p> <input style="width: 100%;" type="text" value="0115551111"/>				
<input type="button" value="Add underwriter"/>				
<a href="#">Add an underwriter</a>				

- j. Number 9: Requires you to state if the insurance market was fully tested. If you do not select “yes” and attach particulars you will have to explain yourself in the box. If you do click yes then you will have to fill out the required particulars.

9 State whether the South African insurance market was tested fully and attach particulars of the proposed placing of insurance in the format of Schedule 1 (please see below)

☐ Yes - particulars are attached

**\* If particulars are not provided, please explain**

Particulars are not necessary in this case  
 (pls ignore this is a test submission for the manual)



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9 State whether the South African insurance market was tested fully and attach particulars of the proposed placing of insurance in the format of Schedule 1 (please see below)

☒ Yes - particulars are attached

**Schedule 1**

**PARTICULARS OF PROPOSED PLACING OF INSURANCE IN THE SOUTH AFRICAN MARKET**

Insurer	Official	Underwrite at any terms	Rate	Premium	Percentage of sum insured which can be accepted	Percentage of sum insured allocated	Actions
No particulars found							

\* (A) Insurer

\* (B) Name of official approached

\* (C) State whether prepared to underwrite an any terms

Yes, this insurer will underwrite the risk ▼

(D) If 'Yes' answered at (c) then the rate at which insurer is prepared to underwrite the risk

(D) If 'Yes' answered at (c) then the value of the annual premium at which insurer is prepared to underwrite the risk

\* (E) Percentage of sum insured which can be accepted

\* (E) Percentage of sum insured allocated

[Add particulars](#)

[Add a set of particulars](#)

9 State whether the South African insurance market was tested fully and attach particulars of the proposed placing of insurance in the format of Schedule 1 (please see below)

☒ Yes - particulars are attached

**Schedule 1**

**PARTICULARS OF PROPOSED PLACING OF INSURANCE IN THE SOUTH AFRICAN MARKET**

Insurer	Official	Underwrite an any terms	Rate	Premium	Percentage of sum insured which can be accepted	Percentage of sum insured allocated	Actions
mr teeth	mr tooth	yes	80	20000	80.00	80.00	<a href="#">Edit</a>   <a href="#">Delete</a>

[Add a set of particulars](#)

- k. Number 10: Requires you to attach a intermediary or Lloyds broker letter and require you to mention risk percentages.



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10 Letter from the intermediary or Lloyd's broker through whom the Lloyd's market was tested

C:\Users\PhantomPhon\

The letter should include an official letterhead.

10.1 The percentage of the risk which can be accepted

10

10.2 The percentage of the risk which can be allocated

10

10.3 If the percentage of risk which can be accepted is less than the percentage which can be allocated, furnish the reason(s) why the full capacity was not allocated to the market concerned

both are the same

(pls ignore this is a test submission for the manual)

- l. Number 11: Requires you to list premiums
- m. Number 12: Requires you to list rates and premiums.
- n. Number 13: Attach a letter from the client.

11 In respect of the placing in the Lloyd's market, state:

11.1 The premium rate

20

11.2 Whether the annual premium is in (select currency)

South Africa, Rand (ZAR)

11.3 The amount of the annual premium

20

12 In respect of the approval sought for placement of the risk in the foreign insurance market other than the Lloyd's market state:

12.1 The percentage placed

50

12.2 The premium rate

50

12.3 Whether the annual premium is in (select currency)

South Africa, Rand (ZAR)

12.4 The amount of the annual premium

50

13 Attach a signed letter from the insured(s) to the effect that he/she/it is aware that, in the event of the application being granted, there will be no assets in the Republic of South Africa to cover the overseas insurers' liabilities towards him/her/it

C:\Users\PhantomPhon\

The letter should include an official letterhead.



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- o. Number 14: State the percentage of the risk allocations. Please note that 14.1, 14.2 and 14.3 have to add up to 100%.

14 State the percentage of the risk that was allocated to

14.1 Local insurers (as per Schedule 1)  
10

14.2 Lloyd's underwriters  
50

14.3 Foreign insurers  
40

The above three fields should add up to 100%. No field can be less than 0% or greater than 100%

- p. Number 15: Ask you about the annual premium payment. Depending on what is selected additional information.

15 If the annual premiums are to be paid in anything other than South African Rand, then please indicate whether an exchange control application will be made for the transfer of funds abroad.

Not applicable

15 If the annual premiums are to be paid in anything other than South African Rand, then please indicate whether an exchange control application will be made for the transfer of funds abroad.

Yes an exchange control application is required

The total amount to be transferred  
23444

The sub-total to be transferred to Lloyd's underwriters  
234234

The sub-total to be transferred to non-registered insurers  
43242

The name of the authorised dealer  
Jimmy Holz

15 If the annual premiums are to be paid in anything other than South African Rand, then please indicate whether an exchange control application will be made for the transfer of funds abroad.

No an exchange control application is \*not\* required

Please explain why an exchange control application is not required  
we really do not need it



- a. Number 16: You need to state if the premium is adjustable. If it is additional information has to be filled in.

16 Is the premium adjustable?

No, premiums are not adjustable ▼

16 Is the premium adjustable?

Yes, premiums are adjustable ▼

Basis of which premiums are to be adjusted

inflation

When will the premium be adjustable

march 2009

Note: Premium adjustment will be allowed by this office only if the original application to place the insurance cover offshore was approved and the same case number will apply. The percentage of the premium adjustment as opposed to the original premium will also be considered.

- b. Number 17: Attach any additional document that is relevant to this form  
c. Number 18: Attach proof of payment if it is your final application.  
d. Number 19: Terms



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17 Are there any other information or documents that are relevant to this form?

C:\Users\PhantomPhon Browse...

Any Formats

18 Attach details of payment of the prescribed fee as well as the amount must be included in order to prove payment of the prescribed fee of R530-00 in respect of a final application only.

C:\Users\PhantomPhon Browse...

Any Format

19 I Mr X (test submission for manual),

19.1 certify, to the best of my knowledge, that that the information contained in questions 1 through 16 of Part D is complete, true and correct.

19.2 certify that the insurance business dealt with in the application will be placed on equivalent terms to those presented to the South African market.

19.3 undertake, in the case of a provisional application, to furnish a final application to the Registrar of Short-term Insurance and the South African Insurance Association as soon as possible, but not later than 10 days after inception of cover or to inform the Registrar that approval is no longer needed.

19.4 undertake to notify the Registrar of Short-term Insurance and the South African Insurance Association immediately of any material changes to the information furnished in questions 5, 6, 8, 9, 10, 11 and 13

Submit or cancel

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- e. Submit Button: A pop up message box confirms your submission **IMPORTANT!** Because you are logged in as “broker admin”. Your submission will be posted and made live for everyone to see. Please make sure all your fields are correct. Alternatively log in as a broker to make sure the form is double checked by a broker admin.



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17 Are there any other information or documents that are relevant to this form?

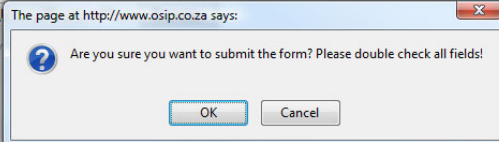
C:\Users\PhantomPhon Browse...

Any Formats

18 Attach details of payment of the prescribed fee as well as the amount must be included in order to prove payment of the prescribed fee of R530-00 in respect of a final application only.

C:\

Any



19 I Mr X (test submission for manual),

- 19.1 certify, to the best of my knowledge, that that the information contained in questions 1 through 16 of Part D is complete, true and correct.
- 19.2 certify that the insurance business dealt with in the application will be placed on equivalent terms to those presented to the South African market.
- 19.3 undertake, in the case of a provisional application, to furnish a final application to the Registrar of Short-term Insurance and the South African Insurance Association as soon as possible, but not later than 10 days after inception of cover or to inform the Registrar that approval is no longer needed.
- 19.4 undertake to notify the Registrar of Short-term Insurance and the South African Insurance Association immediately of any material changes to the information furnished in questions 5, 6, 8, 9, 10, 11 and 13

Submit or cancel


4. Once it has been submitted you can now see the form under submissions.




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Hi, broker

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[Add a new Submission](#)



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Success - the submission was stored and a notification email sent to the FSB SAIA and to all members

Submitted by	Insured name	Start and end date	Objections	Actions
broker	Tom Jones Aerflot (pls ignore this is a test submission for the manual)	23/01/2009 to 20/05/2011	0	<a href="#">details</a>

<< Start < Previous Next > End >>

Display # 20 Results 1 - 20 of 1

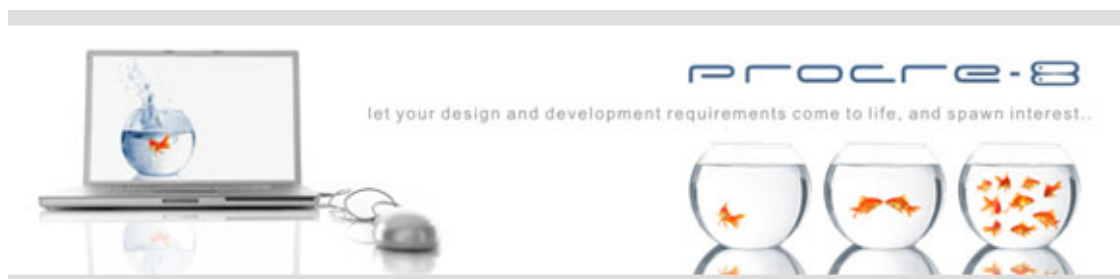



SAIA on your side

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5. You can view the submission details by pressing details.





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---

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### Submission detail

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I, the undersigned, being a/the  
 Mr X (test submission for manual)  
 of  
 Big Planes Pty Ltd (test submission for manual)  
 hereby apply for approval to place insurance with underwriters other than South African short-term insurers and/or Lloyd's underwriters.

The following information is provided in support of the application.

- 1 Indicate the status of this application (Refer to items 5 and 6 of Part A.)  
provisional
- 2 State the address of the intermediary/Lloyds correspondent making the application  
Number 42, Denver Road, Johannesburg (pls ignore this is a test submission for the manual)
- 3 State the name(s) of the insured(s)  
Tom Jones Aerflot (pls ignore this is a test submission for the manual)
- 4 Describe the business of the insured(s)  
Aviation (pls ignore this is a test submission for the manual)
- 5 Describe the cover required, the structure of the cover and the major differences to the cover offered by the South African market and attach supporting documents, if any.  
**Political Risk; Aviation; Engineering; War; Cargo; Sabotage**  
 no one in south africa offers this cover (pls ignore this is a test submission for the manual)

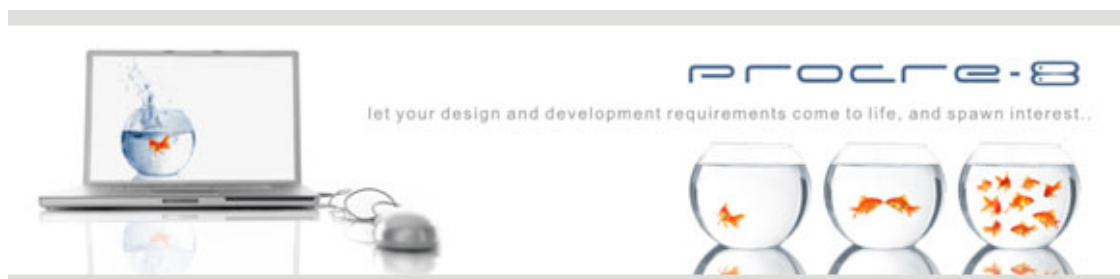
[Information to support cover requirements](#)

Indicate the proposed start date for the insurance  
23/01/2009

Indicate the proposed end date for the insurance  
20/05/2011



- 6 If the proposed period of cover is longer than 1 year, please explain the motivation  
We need a long term cover because of factor X and Y. (pls ignore this is a test submission for the manual)
- 7 State the name(s), postal address(es), contact person(s) and telephone number(s) of the offshore insurer with whom the

6. Here you will be able to view the entire submission as well as download the attached files. You can also download the submission as a text document or as a csv file (tab separated value file).
7. To return to the submission page please click on the submissions tab.
8. Submission from brokers under you, are listed and can be edited in case they are wrong. To approve a submission from your brokers click on details and click on verify and submit or decline this form.







A+ A- RESET

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Hi, broker  
Logout

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Submission detail

Submissions Archives My profile Manage brokers Manage Email templates

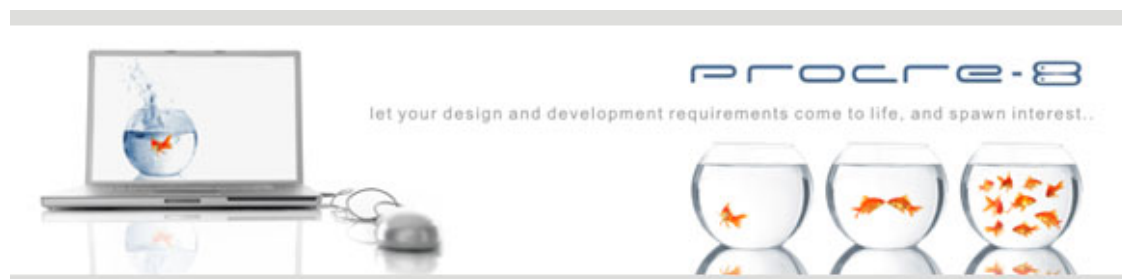
[Download as text document](#)  
[Export and tab separated values file](#)  
[Verify and submit or decline this form](#)

I, the undersigned, being a/the  
test for manual please ignore  
of  
test for manual please ignore  
hereby apply for approval to place insurance with underwriters other than South African short-term insurers and/or Lloyd's underwriters.

The following information is provided in support of the application.

1 Indicate the status of this application (Refer to items 5 and 6 of Part A.)  
provisional  
2 State the address of the intermediary/Lloyds correspondent making the application  
test for manual please ignore  
3 State the name(s) of the insured(s)  
test for manual please ignore  
4 Describe the business of the insured(s)  
test for manual please ignore  
5 Describe the cover required, the structure of the cover and the major differences to the cover offered by the South African market and attach supporting documents, if any.  
test for manual please ignore  
Indicate the proposed start date for the insurance  
21/01/2009  
Indicate the proposed end date for the insurance  
18/07/2013  
6 If the proposed period of cover is longer than 1 year, please explain the motivation  
test for manual please ignore  
7 State the name(s), postal address(es), contact person(s) and telephone number(s) of the offshore insurer with whom the intermediary is applying to place insurance cover

9. If you approve the submission the submission will be out there for all the members to view. If you decline it then you can type in why you want to decline this submission. Your broker will receive an email on why the submission has been declined and he or she will have to edit fill out a new form.





A+ A- RESET

[Home](#)

[News](#)

[About us](#)

[Help](#)

[Contact us](#)

Hi, broker

[Logout](#)

#### Approve/decline a submission

[Submissions](#)

[Archives](#)

[My profile](#)

[Manage brokers](#)

[Manage Email templates](#)

☐ Approve this submission

☒ Decline this submission

\* Please explain why this submission is being declined

sorry but that submission does not make sense

[submit](#)

RV7



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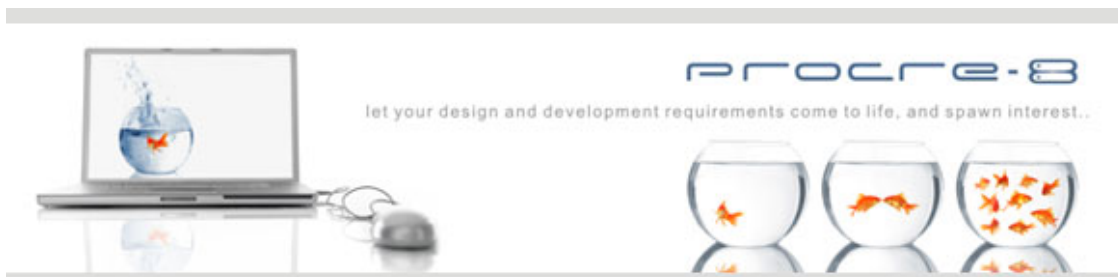


## Archives

**Introduction:** This section includes all previous submitted RV7 forms by the broker admin and all the brokers that are under him.

Illustrated below is the step by step process:

1. You can view the old submission that you or a broker in your team have submitted. These submissions are no longer active and members can no longer view them and object to them as the time frame of 8 days had run out.



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[Home](#) [News](#) [About us](#) [Help](#) [Contact us](#)

Hi, broker [Logout](#)

**Archives**

[Submissions](#) [Archives](#) [My profile](#) [Manage brokers](#) [Manage Email templates](#)

Submitted by	Insured name	Start and end date	Objections	Actions
No archived submissions found				

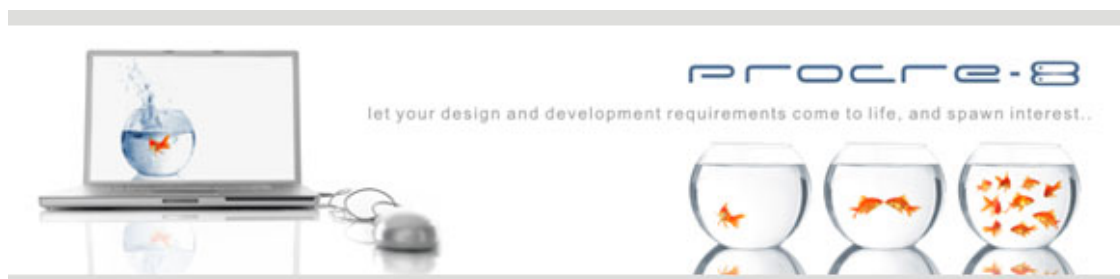
<< [Start](#) < [Previous](#) [Next](#) > [End](#) >>

Display #  Results 1 - 20 of 0

  
on your side

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2. If you click on details you can view the details again. To return click the tab above.

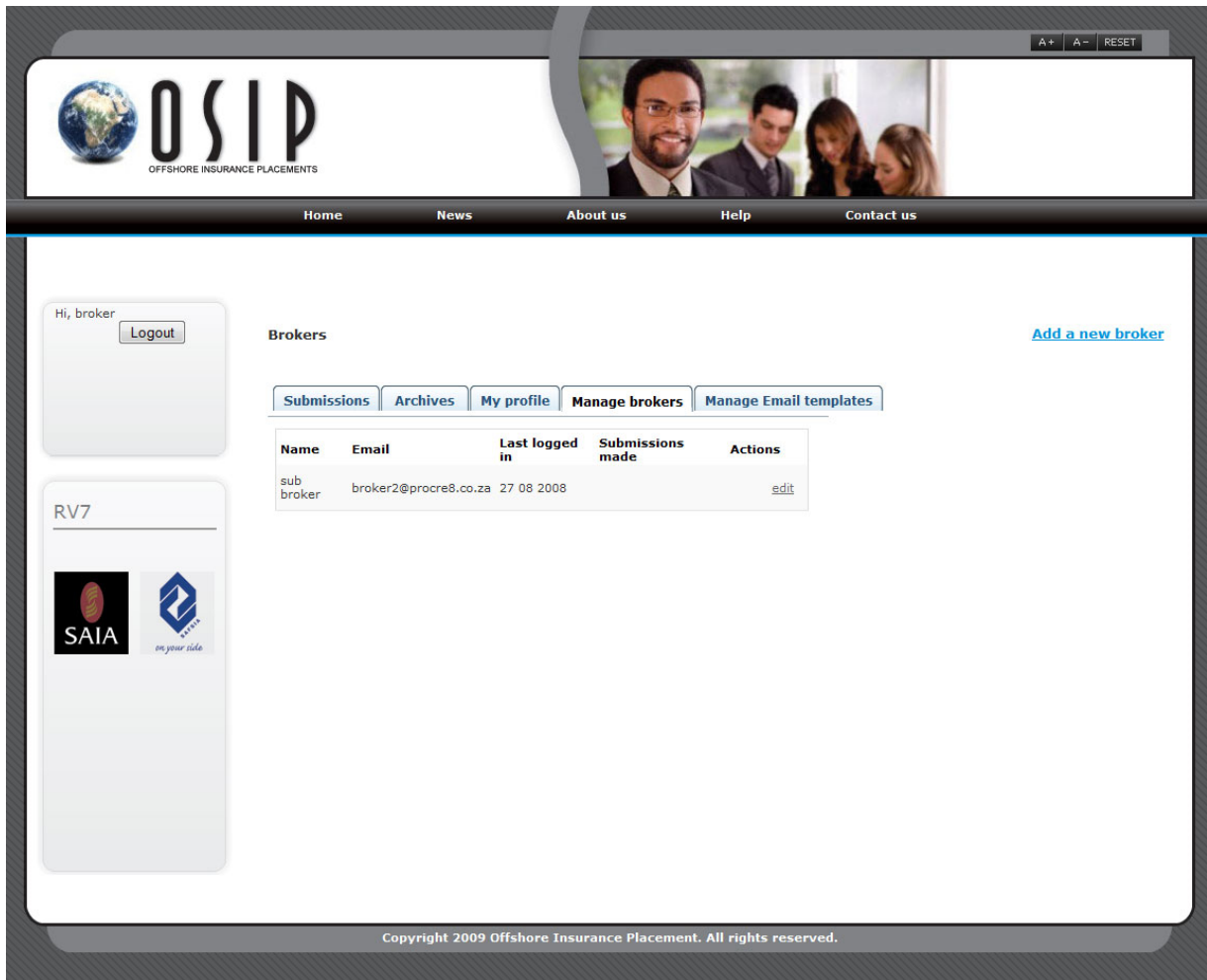


## Manage Brokers

**Introduction:** This section enables you to add remove and manage the various brokers that are under you.

Illustrated below is the step by step process:

1. To add a new broker under you press “add a new broker” on the top right.



Hi, broker [Logout](#)

**Brokers** [Add a new broker](#)

[Submissions](#) [Archives](#) [My profile](#) [Manage brokers](#) [Manage Email templates](#)

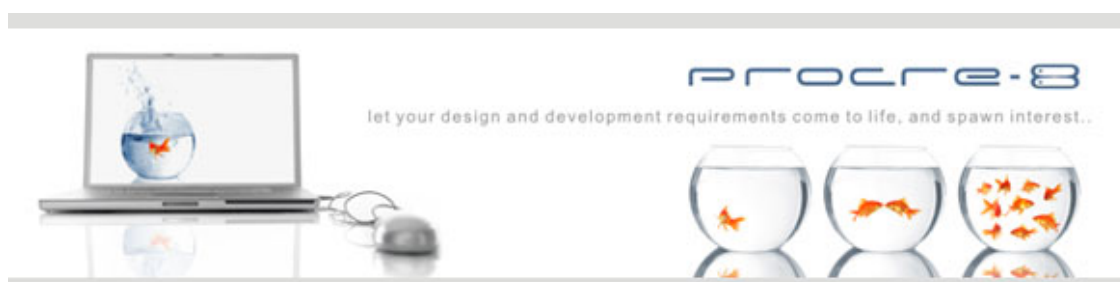
Name	Email	Last logged in	Submissions made	Actions
sub broker	broker2@procre8.co.za	27 08 2008		<a href="#">edit</a>

RV7

SAIA on your side

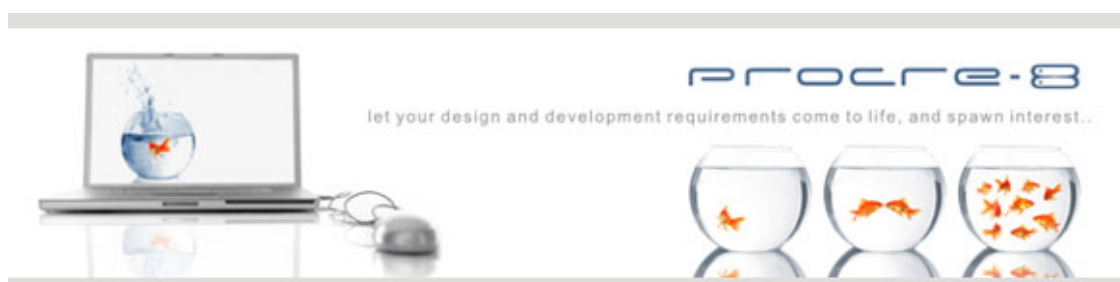
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2. Fill in the brokers details. The user name and the password will be sent to the email address that you specified. A password will be automatically generated which the broker can use to log in.





3. A new broker has now been added.







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A+ A- RESET

[Home](#)
[News](#)
[About us](#)
[Help](#)
[Contact us](#)

Hi, broker

[Logout](#)

---

RV7



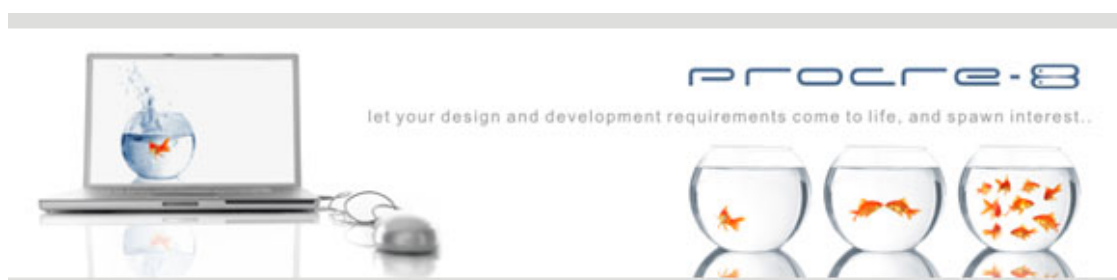

**Brokers** [Add a new broker](#)

[Submissions](#)
[Archives](#)
[My profile](#)
[Manage brokers](#)
[Manage Email templates](#)

Name	Email	Last logged in	Submissions made	Actions
sub broker	broker2@procre8.co.za	27 08 2008		<a href="#">edit</a>
sub_broker2	sub_broker2@procre8.co.za	30 11 1999		<a href="#">edit</a>

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4. If you want to edit an existing broker click on the edit button.




  
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[A+](#)
[A-](#)
[RESET](#)

[Home](#)
[News](#)
[About us](#)
[Help](#)
[Contact us](#)

Hi, broker
 [Logout](#)

RV7
 



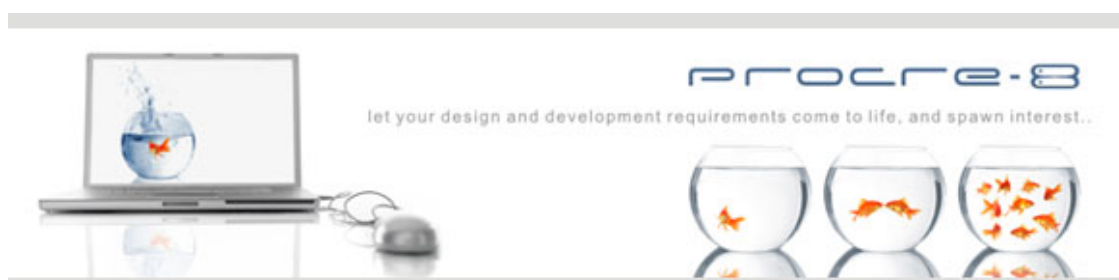

**Brokers**
[Add a new broker](#)


[Submissions](#)
[Archives](#)
[My profile](#)
[Manage brokers](#)
[Manage Email templates](#)

Name	Email	Last logged in	Submissions made	Actions
sub broker	broker2@procure8.co.za	27 08 2008		<a href="#">edit</a>

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5. You can now edit and manage your broker.





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[A+](#) [A-](#) [RESET](#)

[Home](#)
[News](#)
[About us](#)
[Help](#)
[Contact us](#)

Hi, broker

[Logout](#)

---

RV7




### Manage my profile

[Submissions](#)
[Archives](#)
[My profile](#)
[Manage brokers](#)
[Manage Email templates](#)

\* Name

\* Email address

\* Username

Leave these fields blank to keep the current password

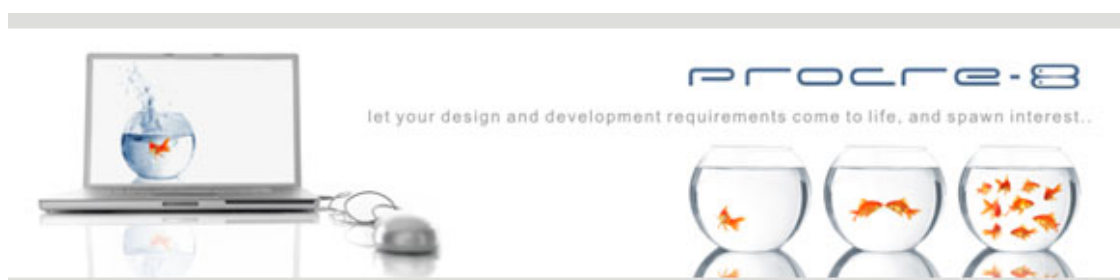
Password

If changing your password, please confirm your new password

or [cancel](#)

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6. **REMEMBER:** A broker under the broker admin cannot directly publish a RV7 form for everyone to see. The Form will first go to the broker admin who has to double check the form and press authenticate, before it is released.




## Manage Email templates (advanced)

**Introduction:** Here you can edit the format of the email template that gets send out.

Illustrated below is the step by step process:

1. You can customize your email templates if you like. Simply click edit on the template that you want to customize.

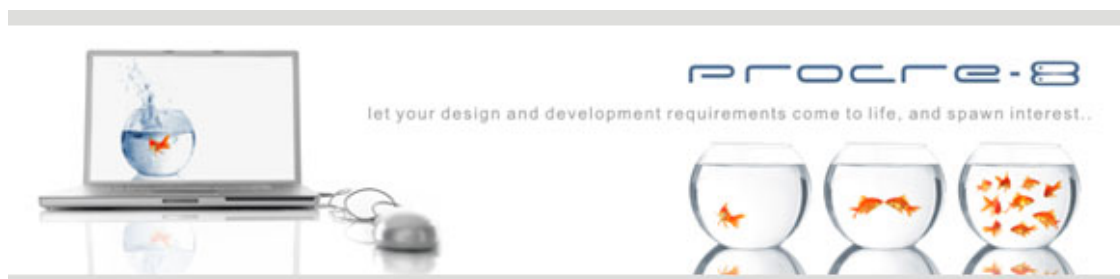


The screenshot shows the OSIP web application interface. The header includes the OSIP logo and navigation links: Home, News, About us, Help, and Contact us. The main content area is titled 'Email templates' and features a table with various email templates. The table has three columns: Name, Description, and Actions. Each row represents a different email template, and the 'Actions' column contains an 'edit' link for each template.

Name	Description	Actions
Broker admin form submission requires review alert	This email is sent to the broker admin to alert them to a new submission requiring review	<a href="#">edit</a>
FSB SAIA new objection notification email	This email is sent to the FSB SAIA when a new objection is filed	<a href="#">edit</a>
FSB SAIA new submission alert email	This email gets sent out to the FSB SAIA whenever a new submission is approved by a broker admin	<a href="#">edit</a>
Member new submission alert email	This email gets sent out to all members whenever a new submission is approved by a broker admin	<a href="#">edit</a>
New objection notification email	This email is sent to the brokeradmin and submitter when a new objection is filed	<a href="#">edit</a>
New submission receipt confirmation	This email is sent to the person responsible for submitting a new form before it is checked over by the broker admin	<a href="#">edit</a>
Registration Email	This email gets sent out to new brokers to confirm their login details	<a href="#">edit</a>
Submission approved notification to submitter	This email goes out to the person responsible for a submission when that submission has been approved	<a href="#">edit</a>
Submission declined notification to submitter	This email is sent to the person responsible for a submission when it is declined by a brokeradmin	<a href="#">edit</a>
User update email	This email gets sent out to existing brokers whose details have been updated	<a href="#">edit</a>

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2. Once inside the template you can write your own text. Press save to confirm the changes.



Hi, broker

Logout

#### Email templates

[Submissions](#) [Archives](#) [My profile](#) [Manage brokers](#) [Manage Email templates](#)

#### User details

##### \* Email subject

{SITE\_NAME} - submission requi

##### \* Email body

Dear {NAME},

One of your brokers  
(SUBMITTED\_BY\_NAME) has submitted a  
new application. Please log into  
<http://www.osip.co.za> and verify  
correctness of the form.

Members and/or SAIA/FSB will not be able  
to see or process the form until this  
has been done.

The following placeholders are available for use  
{NAME} Broker's name  
{SITE\_NAME} Name of the host website  
{APPROVED\_BY\_NAME} Name of person approving a new form  
{NAME} Broker's name  
{SITE\_NAME} Name of the host website  
{APPROVED\_BY\_NAME} Name of person approving a new form  
{NAME} Broker's name  
{SITE\_NAME} Name of the host website  
{APPROVED\_BY\_NAME} Name of person approving a new form  
{NAME} Broker's name  
{SITE\_NAME} Name of the host website  
{APPROVED\_BY\_NAME} Name of person approving a new form

or [cancel](#)

RV7



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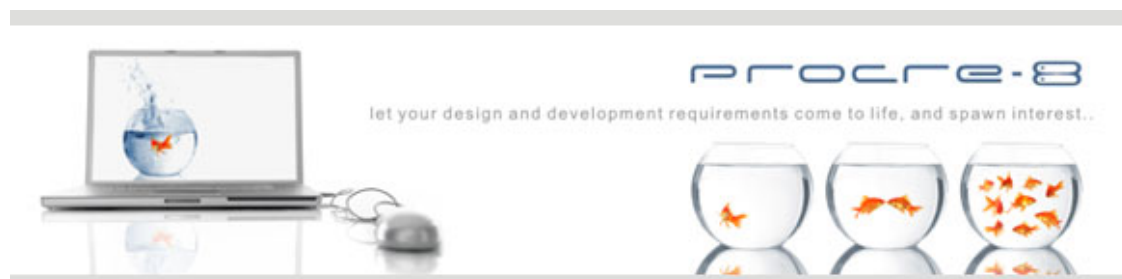


### *Manage your Profile*

**Introduction:** This section enables you to manage your profile such as your username, password and more.

Illustrated below is the step by step process:

1. Under my profile you can update your details such as user name, email address, username and password.







A+ A- RESET

[Home](#)

[News](#)

[About us](#)

[Help](#)

[Contact us](#)

Hi, broker

[Logout](#)

#### Manage my profile

[Submissions](#)

[Archives](#)

[My profile](#)

[Manage brokers](#)

[Manage Email templates](#)

\* Name

broker

\* Email address

broker@procre8.co.za

\* Username

broker

Leave these fields blank to keep your current password

Password

If changing your password, please confirm your new password

[submit](#) or [cancel](#)

RV7



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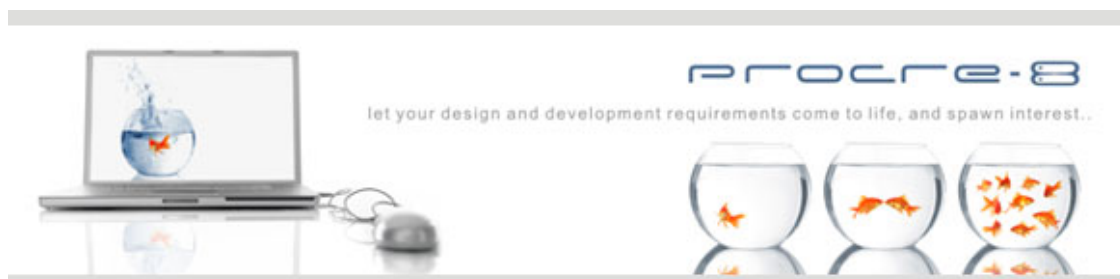
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## Broker instructions

**Broker vs Broker Admin Explained:** The broker admin can have many brokers under him/her. This means when a broker under a particular broker admin submits an RV7 the broker admin has to approve the document first, before it is submitted for everyone to see. In contrast if the broker admin submits a RV7 form it does not need any approval and will be directly published.

1. As a broker under a broker admin you cannot register yourself. A broker needs to register you. To receive a username and a password please contact your broker admin to register you. The reason behind brokers and broker admins is so that there is one final check before the RV7 form gets released. In a company of for instance 20 people one person should be the broker admin who checks all the forms before they get released. While the other 19 brokers submit the forms.
2. Once you have received your details please go to <http://www.osip.co.za/> and log in.



[Home](#)

[A+](#) [A-](#) [RESET](#)



[Home](#) [News](#) [About us](#) [Help](#) [Contact us](#)

Username  
  
Password  
  
☐ Remember me  
  
[Lost Password?](#)  
[No account yet? Register](#)

RV7



### Information

Dear Visitor,

We need your help to test.

So please log in and test the system. If you do not have a user name or a password for testing please send an email to [phil@procre8.co.za](mailto:phil@procre8.co.za) or phone 011-726-8991 (ask for philipp).

You can also contact or Ursula Moosa from SAIA on 011-726-5381 [Ursula@saia.co.za](mailto:Ursula@saia.co.za) or Tshidi Khutlapey from the FSB on 012-422-2982 [tshidik@fsb.co.za](mailto:tshidik@fsb.co.za) should you have any questions.

### Web Browser

Upgrade you online experiance! If you are using Internet Explorer 6 or lower, you should upgrade.

A few reasons to upgrade are web page compatibility, security and new technology advancements.

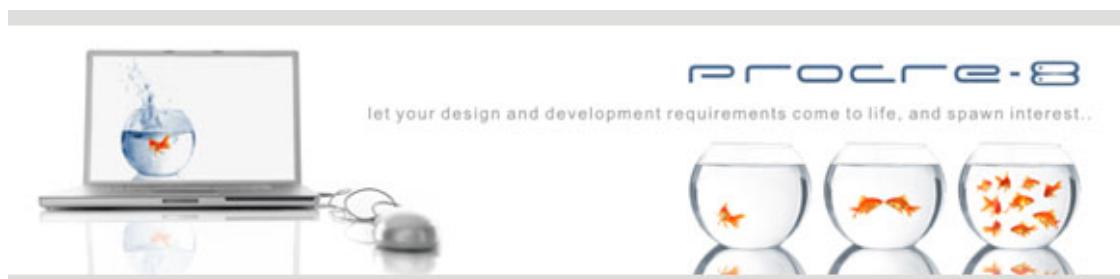
Upgrade is **FREE**.

Click on the images to upgrade.



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- Once logged in you will see the dash board with submission archives and my profile tab





A+ A- RESET

Home

News

About us

Help

Contact us

Hi, sub\_broker2

Logout

#### Dashboard

[Add a new Submission](#)

[Submissions](#) [Archives](#) [My profile](#)

Submitted by	Insured name	Start and end date	Objections	Actions
No submissions found				

<< Start < Previous Next > End >>

Display # 20 Results 1 - 20 of 0

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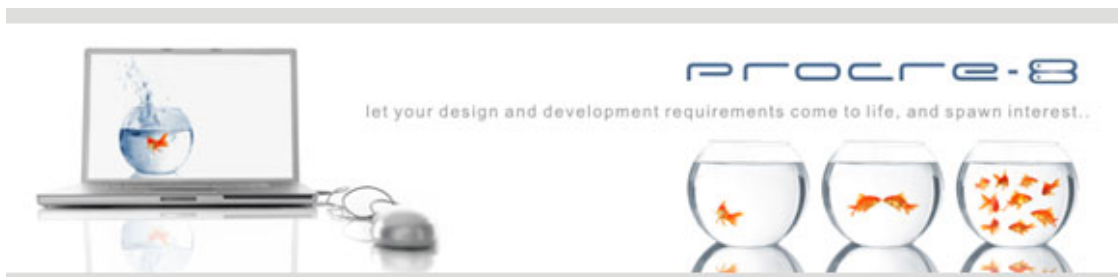


## Submissions

**Introduction:** This step by step manual will explain how to successfully submit and manage your RV7 application as.

Illustrated below is the step by step process:

1. The Submission is exactly the same as with the broker admin. Please see that section for details. The only differences are listed below.
2. You can edit the form until your broker admin has approved it. Once it is approved you can not change it anymore.
3. If the broker admin approves your submission you will not be able to edit your submission anymore. If the broker admin declines it you will receive an email to notify you why. You will then have to edit your current submission or make a new one, up to the point where your broker admin is happy and will approve it.
4. Error Control: Any error that the system can pick up will be highlighted and shown.





A+ A- RESET

Home

News

About us

Help

Contact us

Hi, sub\_broker2

Logout

Add/edit a submission

Submissions

Archives

My profile

Oops - 1 error was detected which prevent this form from being saved

Specific information

FINANCIAL SERVICES BOARD REPUBLIC OF SOUTH AFRICA

SHORT-TERM INSURANCE ACT, 1998 (ACT 53 OF 1998)

Page 2 of 3

\* I, the undersigned, being a/the  
test for manual please ignore

\* of  
test for manual please ignore

hereby apply for approval to place insurance with underwriters other than South African short-term insurers and/or Lloyd's underwriters.

The following information is provided in support of the application.

1 \* Indicate the status of this application (Refer to items 5 and 6 of Part A.)

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[Home](#)

[News](#)

[About us](#)

[Help](#)

[Contact us](#)

Hi, sub\_broker2

[Logout](#)

Dashboard

[Add a new Submission](#)

[Submissions](#)

[Archives](#)

[My profile](#)

Success - the form submission was successfully received

Submitted by	Insured name	Start and end date	Objections	Actions
sub_broker2	test for manual please ignore	21/01/2009 to 18/07/2013	0	<a href="#">edit</a>   <a href="#">details</a>

<< Start < Previous Next > End >>

Display # 20 Results 1 - 20 of 1

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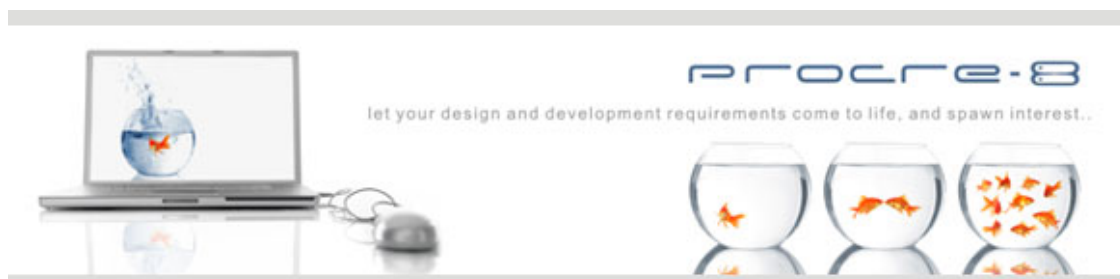


## Archives

**Introduction:** This section includes all your previous submitted RV7 forms.

1. You can view the old submission that you have submitted. These submissions are no longer active and members can no longer view them and object to them as the time frame of 8 days had run out.

The screenshot shows the OSIP website interface. At the top, there is a header with the OSIP logo (a globe and the text "OSIP OFFSHORE INSURANCE PLACEMENTS") and a navigation bar with links: Home, News, About us, Help, and Contact us. Below the header, there is a user login area on the left with the text "Hi, sub\_broker2" and a "Logout" button. The main content area is titled "Archives" and contains a tabbed interface with "Submissions", "Archives", and "My profile". The "Archives" tab is active, showing a table with columns: Submitted by, Insured name, Start and end date, Objections, and Actions. The table content indicates "No archived submissions found". Below the table, there are navigation links: "<< Start < Previous Next > End >>" and a display count: "Display # 20 Results 1 - 20 of 0". On the left side of the main content area, there is a sidebar with the text "RV7" and two logos: SAIA and another logo with the text "on your side". At the bottom of the page, there is a copyright notice: "Copyright 2009 Offshore Insurance Placement. All rights reserved."



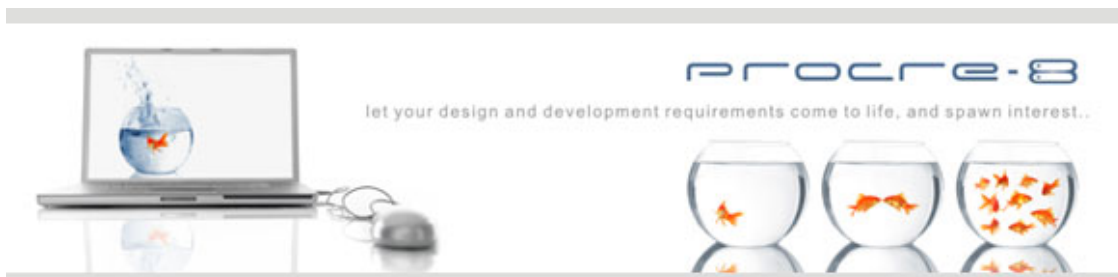
## My Profile

Manage your Profile

**Introduction:** This section enables you to manage your profile such as your username, password and more.

Illustrated below is the step by step process:

1. Under my profile you can update your details such as user name, email address, username and password.





[Home](#)

[News](#)

[About us](#)

[Help](#)

[Contact us](#)

Hi, sub\_broker2

[Logout](#)

#### Manage my profile

[Submissions](#)

[Archives](#)

[My profile](#)

\* Name

sub\_broker2

\* Email address

sub\_broker2@procre8.co.za

\* Username

sub\_broker2

Leave these fields blank to keep your current password

Password

If changing your password, please confirm your new password

[submit](#) or [cancel](#)

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