

# STEP BY STEP GUIDE TO VESSEL CHARTERING

If this is your first time chartering a vessel with WHOI or if you are just double checking that you have completed all the steps, this guide will help you get your charter approved and all necessary paperwork submitted, so you can focus more on your science.

[charters@whoi.edu](mailto:charters@whoi.edu)

Kim Malkoski Vessel Charter Admin x3522



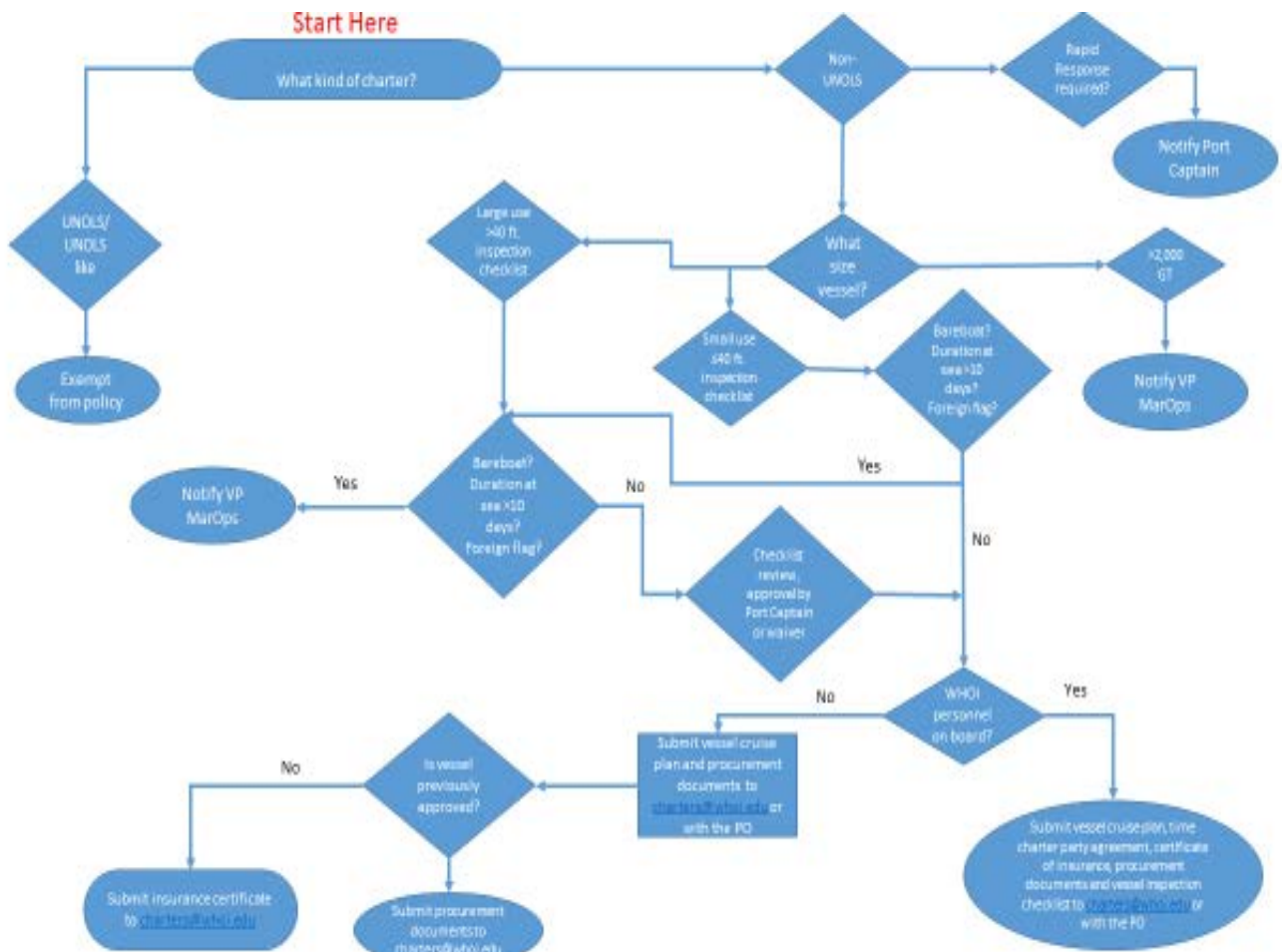
If you are chartering a UNOLS vessel, no paperwork is necessary, and you are all set. If you are unsure if the vessel is part of UNOLS, you can check here <https://www.unols.org/ships-facilities/unols-vessels> or check the [UNOLS Small research Vessel Inventory](#)

This document contains the following:

- Getting Started and Flow Chart
- Required Documents
- How to fill out Electronic Purchase Order
- FAQs

## Getting Started

First, start with the Flow Chart to determine the type of vessel you have, the necessary paperwork requirements and steps needed.



## Required Documents

Each vessel must have the following documents on file with the Vessel Chartering Admin through Marine Ops. All paperwork may be either submitted ahead of time to [charters@whoi.edu](mailto:charters@whoi.edu) or can be attached to the electronic purchase order (see filling out Electronic Purchase Orders section for more details)

If your charter is already on the approved vessel checklist and all paperwork is current, then submit the Cruise plan, Charter Agreement and single source justification for Procurement.

### ❖ **A copy of the Certificate of Liability Insurance**

- When possible please have WHOI named additional insured on the policy. If it is not possible to have this done due to significant costs or roadblock, the administration may forego having it.
- A current certificate must be on file, so if the vessel is already approved, but the Certificate has expired, a new updated copy will be needed
- If the vessel needs additional insurance requirements such as additional Charterer's Liability (for vessels over 2000GT) or Pollution (when not included in P&I), please contact Deb Hamel [dhamel@whoi.edu](mailto:dhamel@whoi.edu) at Risk Management with questions.

### ❖ **Vessel inspection Checklist**

- There are two checklist options based on the vessel size 40ft or less and Over 40ft
  - The 40ft cutoff comes from the US Coast Guard and National Safe Boating Council checklists to determine where to split the vessels based on length.
  - The checklist for vessels over 40ft is based on the UNOLS vessel checklist per the UNOLS Guidance document for chartering non UNOLS vessels.
  - The list for the vessels 40ft or less is guidelines from the Scientific Boating Safety Council (this council is very similar to the AAUS one for divers). There are a checklist to be filled out by the owners of the vessel before the cruise and an inspection list for the PI upon arrival to ensure proper safety of the PIs and their teams.
  - The over 40ft checklist must be reviewed and approved by the Port Captain
    - Pages 2 and 3 may be waived if a current USCG Certificate of Inspection is on file
  - Please submit the PI inspection list for vessels 40ft or less after the cruise or once you have inspected the vessel and everything is up to code.

### ❖ **Charter Party Agreement**

- The charter agreement is the agreement between WHOI and the vessel owner whereby the understanding and expectations of both parties are agreed.

### ❖ **Cruise Plan**

- If the cruise is longer than 3 or 4 months away, the cruise plan can be submitted via email to [charters@whoi.edu](mailto:charters@whoi.edu) close to the actual cruise date
- If the cruise is less than one month away the plan can be either emailed ahead of time with the other required documents or attached as part of the electronic purchase order

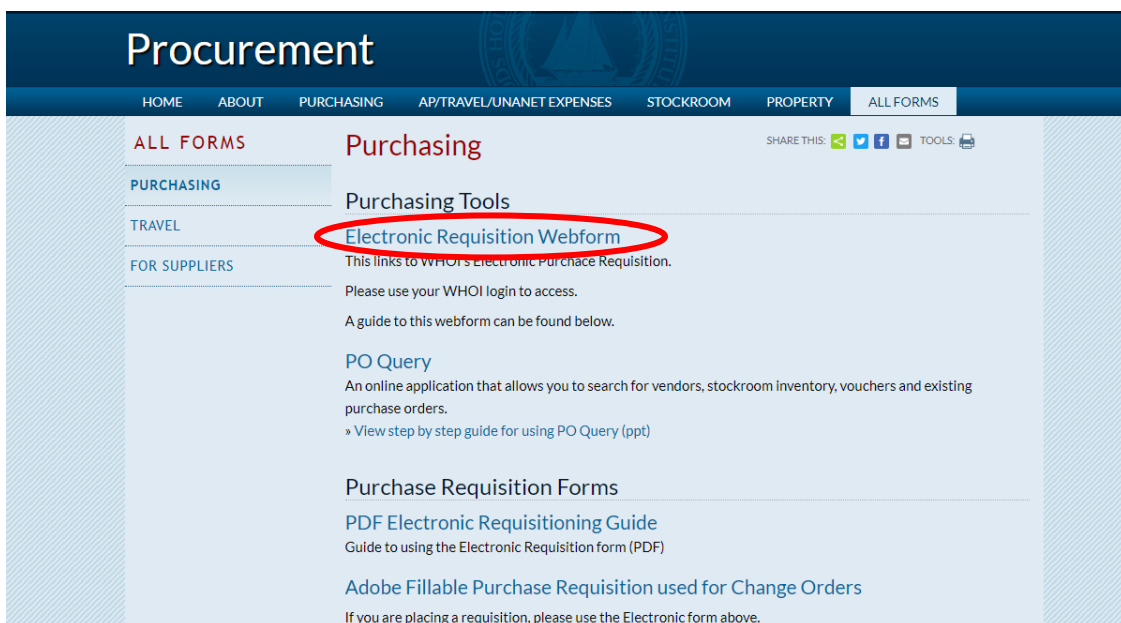
- The fillable form is there as a reference, but if you have longer more detailed cruise plans to submit those are also accepted.

## How to Fill out an Electronic Purchase order

1. From the internal website click the Procurement link
2. Next Select all Forms -> [Purchasing](#)



3. Next Click top Option for Electronic Requisition Webform



4. You will be required to log in with your WHOI account

- a. Fill in the appropriate boxes and add all required paperwork as attachments
  - i. includes Invoice, Cruise plan, Charter agreement, and Single sole source justification (COI and vessel checklist if not already on file)

SunGard – New Item  
 → Purchase Request Form

PURCHASE REQUEST FORM Click [HERE](#) to open i

Vendor:  Status:     
 P.R.#:

Vendor Address:  Select Address Code ▾ Vendor Contact:

Required Date:  Requester:  Shop Work Order:

Delivery Location: Building  Room

Object Lookup:

Line Items:	# Account	Object	WO	Description	Catalog #	Freight	Qty	UOM	Unit
<input checked="" type="checkbox"/>	1								> Select Units ▾

Service or Custom Product?  
 Radioactive Material?

**ATTACHMENTS**

Attached Documents (first 6)

Attach or view any applicable documentation

5. Then hit submit at the bottom
  - a. This will send to charters to be approved with a 24-hour window

Other useful forms listed below

- If you have questions about filling out the form, you can click the upper green area that says Click here to open instructions on how to fill out the PO or open the [PDF Electronic Requisitioning Guide](#)
- [Purchase Requisition used for change orders](#) is fillable PDF that can be emailed to Procurement, they can not be done in the Electronic Requisition Form
- [Single/ Sole Justification forms](#) will also need to be filled out when appropriate to do so and can be found on the same page

## Purchase Requisition Forms

### PDF Electronic Requisitioning Guide

Guide to using the Electronic Requisition form (PDF)

### Adobe Fillable Purchase Requisition used for Change Orders

If you are placing a requisition, please use the Electronic form above.

This Purchase Requisition form is for Change Orders.

This is a fillable requisition form.

### (WORD DOC) Justification for Single/Sole and Urgent Purchases Form

This is the NEW and IMPROVED sole source justification form mentioned in the Uniform Guidance and Webform discussions. Please use this form for Sole Source Justification.

If you are filling this form out for a requisitioner, please indicate that you are signing on their behalf where signatures and initials are requested.

## FAQs

1. If the vessel is owned by a foreign country is all the paperwork required?
  - a. Requests for Foreign Flagged vessels require approval of the VP of Marine Operations who will work with you in getting any necessary paperwork and the steps to chartering the foreign vessel
2. If there is an emergency/quick response charter needed who do I contact about an immediate response?
  - a. Please contact [charters@whoi.edu](mailto:charters@whoi.edu) and Eric Benway [ebenway@whoi.edu](mailto:ebenway@whoi.edu)
    - i. Final approvals will go through the Port Captain
3. What does it mean to have WHOI named additional insured on the vessel owner's insurance "when possible"?
  - a. Always start by asking to have WHOI named additional insured
  - b. If naming WHOI additional insured is going to extend the length of the paperwork process or incur additional expense then it may be waived
4. My Purchase Order was not approved by charters, what is my next step?
  - a. Is all the appropriate paperwork on file or has it been handed in? If no, then once all paperwork is received charters can approve your PO. There is a 24-hour window for the approval process. Feel free to email [charters@whoi.edu](mailto:charters@whoi.edu) with questions about not approved
5. I am chartering a vessel with no WHOI personnel on board, is all Paperwork required?
  - a. If the vessel is already on the list of approved vessels, then you only need to submit a cruise plan with your Purchase Order

- b. If the vessel is not on the list, then the Port Captain and Port Office will determine if any paperwork can be waived
- 6. Dive operations are happening from the chartered vessel, do I need to fill out additional paperwork?
  - a. Dive operations paperwork is not part of the vessel chartering process, but if dive operations are to take place contact Ed O'Brien Dive Operations Manager [eobrien@whoi.edu](mailto:eobrien@whoi.edu)
- 7. If the vessel is US Coast Guard Inspected, or equivalent is all paperwork required?
  - a. Pages 2 and 3 of the over 40 ft. vessel inspection check list may be waived if a certificate of inspection is presented or is on file
- 8. How do I become a WHOI certified vessel Operator for a bareboat charter?
  - a. All bareboat charters must be approved by the VP for Marine Ops
  - b. Please refer to the WHOI Small boat program *insert link to whoi page when built*
    - i. a training course is run every summer in August for Basic Small Boat Operations.