



Cloud Fleet Manager

# MANUAL

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## CSM CREWING

2023-03-31

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## CSM Crewing

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# 1. About This Guide

This user guide provides an introduction to CSM Crewing and describes how you can leverage the application to meet your business needs.

CSM Crewing allows you to carry out all crew-related processes relevant to the crew on board the vessel. Synchronization of the latest data between Cloud Ship Manager (CSM) and Cloud Fleet Manager (CFM) must be initiated on a regular basis so that a smooth workflow between the crew on board and the colleagues in the office is guaranteed. To synchronize data to the shoreside, select **Submit Changes** which is indicated by the circled arrow  icon.



## TIP

A green color-coded circled arrow icon indicates that CSM contains data that was not synchronized yet.



CSM Crewing consists of two tiles:

- **Me**  
The **Me** tile provides an overview of the seafarer that is currently logged in to CSM. General and assignment-specific information, such as licenses, certificates, medical reports and rest hours are displayed.
- **Crew**  
The **Crew** tile in turn includes the following tabs:
  - **Dashboard**

- [Crew List](#)
- [Payroll](#)
- [Meals & Lodgings](#)



### NOTE

The **Me** tile is only displayed if the seafarer is logged in with his own credentials.

If you use the rank login, the **Me** tile is hidden as several seafarers with the same rank could be on board the vessel and it cannot be ensured that the correct data is displayed.

For more information, see [Login to Cloud Ship Manager \[8\]](#).

If you cannot access the **Crew** tile from the Cloud Ship Manager (CSM), please contact your system administrator to assign the relevant permissions to your user in the **CFM Ship Client Manager** app.

This user guide describes the features and functions available to a user with full access to the application. If you're expecting rights that your user currently doesn't have, get in contact with your system administrator.

## 2. Initial Setup

Before you can start to use CSM Crewing, certain prerequisites must be met.

1. Download and install the CSM server.
2. Download and install the CSM client.
3. Manage access to the applicable CSM modules for different ranks using the [CFM Ship Client Manager](#) app.
4. Manage access to CSM for users and corresponding vessels using the [CFM Ship Client Manager](#) app.
5. Login to the CSM client.

### See Also

For detailed information about the setup process, see our installation guide under [CFM Ship Client Manager > Documentation > Cloud Ship Manager Setup](#).

## 3. Login to Cloud Ship Manager

You have two options, to login to your Cloud Ship Manager client.

- **Login with rank**

This is the standard login procedure on board the vessel. You use the rank that you're currently holding during the assignment.

- **Login as a seafarer**

You login with your own user account as a seafarer.

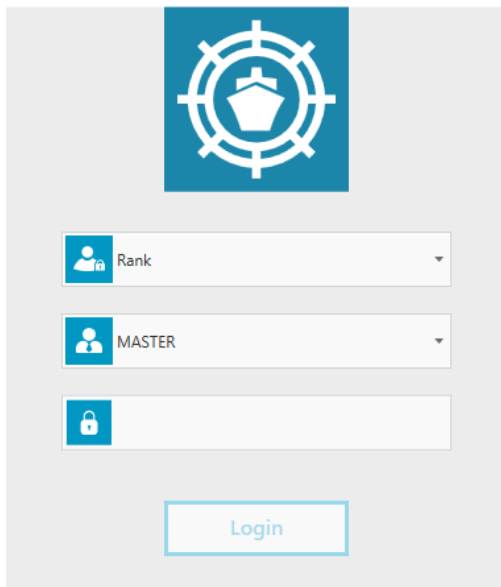
For this login option to work, your user account must be activated and the corresponding permission rights must be assigned to the rank the seafarer is holding during the current assignment. The seafarer login serves as a personal identification.

Another prerequisite is that you must be planned for an assignment so that your data is synchronized to CSM.

### 3.1. Login with Rank

To login with the current rank on board the vessel, proceed as follows.

1. Open your CSM client.
2. Choose **Rank** from the drop-down list.



3. Choose the rank you're holding during the assignment from the second drop-down list.
4. Enter the corresponding password.







**NOTE**

A generic password for the rank is provided once you purchased CSM.

The passwords for the different ranks can be managed under [CFM Ship Client Manager > Configuration > Users](#).

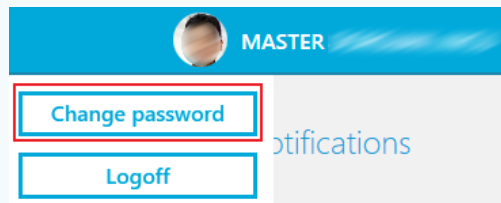
Choose the  crossed-out eye icon to view your entered password and select the  eye icon to hide your password again.



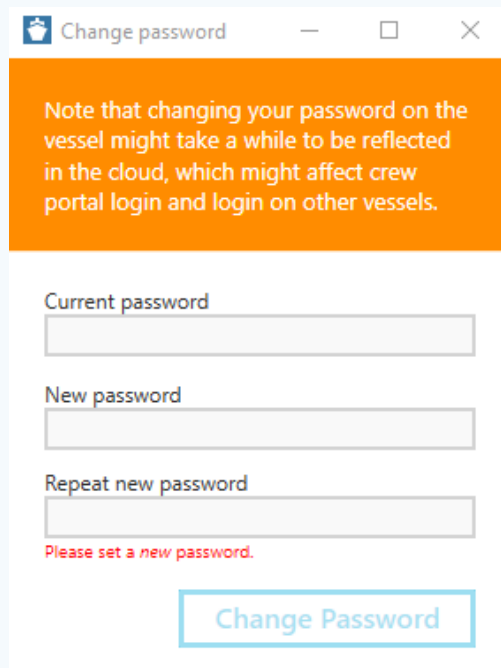
**TIP**

You can change the password after the first login given that the required permission was assigned to your user account.

1. Choose the user avatar in the upper right corner and choose **Change password**.



2. Enter your current password in the dialog window.



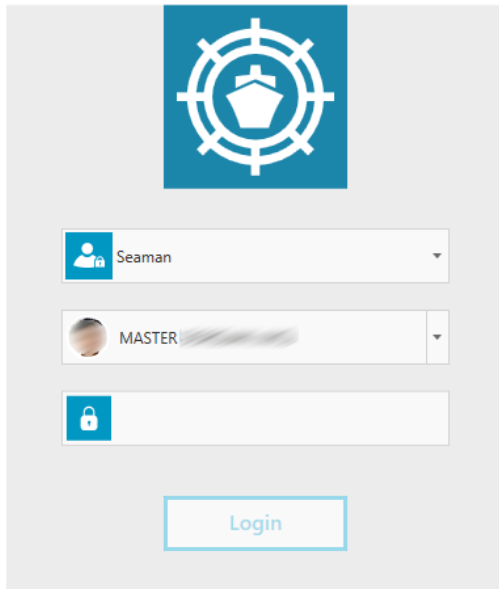
3. Enter your new password.
4. Repeat your new password.
5. Choose **Change Password** to save your new password.

5. Choose **Login** to login to the CSM client.

## 3.2. Login as a Seafarer

To log in with your seafarer user, proceed as follows.

1. Open your CSM client.
2. Choose **Seafarer** from the drop-down list.



3. Choose your user account from the second drop-down list.



### NOTE

All seafarers that are part of the crew list for the current assignment and for whom user accounts exist are available in the drop-down list.

4. Enter your password.
5. Choose **Login** to login to the CSM client.

## 4. Me

The **Me** tile provides an overview of the seafarer that is currently logged in to CSM.

The data that is displayed applies to the current assignment of the seafarer. Once a seafarer has disembarked the vessel, the data is still available for a period of 7 days before it is removed due to GDPR reasons.

The screenshot shows the 'Me' tile interface with the following tabs and data:

- General** (Seafarer ID #139):
  - Profile: MASTER Voyage Employee
  - Nationality: Indian; Height / Weight: 177.00 cm / 92.00 kg
  - Birthdate / Place of Birth: 2/24/1998 / KANIKDA-GOA; Overall Size: L
  - Shoe Size: 10; Videotel ID: Not entered
  - Nearest Airport: Dabolim Airport; Cabin Number: Not entered
  - Familiarization Date: 11/24/2022; Familiarization Date for Deck: Not familiarized yet
  - Domain Login: 596
  - Address: F-2, BLDG - C, PRIMA BAI ENCLAVE, SORDEA, MARGAD, 409002, SALCETTE, GOA, India
  - Communications: Telephone: [redacted]; Mobile: [redacted]; Telephone: [redacted]; Mobile: [redacted]
  - Buttons: Familiarize, Export Record Card
- Licenses**:
  - GMDSS GOC INDIAN ( National ) MASTER**: Number: 65024724, Issue Date: 6/20/2018, Expiry Date: 10/25/2023
  - Endorsement**: Issue Date: 9/7/2021, Expiry Date: 6/25/2025
  - COP Rating Navigation Watch ( Afghanistan ) ADMINISTRATION OFFICER**: Number: 1234576, Issue Date: 11/1/2021, Expiry Date: 6/25/2025
- Assignment Details**:
  - Start of Contract (Departure from Home): 11/7/2022; End of Contract (Arrival at Home): 3/16/2023
  - Embarkation Date: 11/7/2022; Disembarkation Date: 3/15/2023
  - Embarkation Port: TBA (Unknown); Disembarkation Port: TBA (Unknown)
  - Sign-off Request: [icon]; Next Availability: [icon]
  - Takeover Command: [icon]
- Additional Properties**: (Empty)
- Flights**:
  - Embarkation Flight Ticket: Add
  - Disembarkation Flight Ticket: Add
- Assignment Documents**: (Empty)

It is divided into the following tabs:



### IMPORTANT

The color-coded indicator next to each tab indicates the worst status of at least one entry in the corresponding list.

- **General**

On the **General** tab, you get a basic overview of the seafarer, including general information, such as date and place of birth, nationality, address, and communication details.

Available and missing licenses are also displayed as well as information on the current assignment and available flight information.

In addition, assignment-related details and documents are displayed as well as additional properties and flight documents that were necessary for the seafarer to (dis-)embark the vessel for this assignment.

- **Travel Documents**

The **Travel Documents** tab lists all passports, seaman books, and visas that are relevant for the seafarer.

- **Certificates**

The **Certificates** tab lists all general certificates required according to the STCW as well as medical certificates and vaccinations.

- **Medical Reports**

The **Medical Reports** tab gives you an overview of the existing medical reports for the seafarer and allows you to create new medical reports.

For more information on how to add medical reports or how to export them, see either [Add Medical Reports \[24\]](#) or [Export Medical Reports \[32\]](#).

- **Rest Hours**

The **Rest Hours** tab displays the rest hours of the seafarer that is currently logged in. The rest hours are displayed for the current assignment.

The seafarer enters the rest hours himself which then must be confirmed by the Captain or any other eligible CSM user.

For more information on how to manage rest hours, refer to the following chapters:

- [View Deficiencies \[38\]](#)
- [Add Rest Hours \[40\]](#)
- [Edit Rest Hours \[41\]](#)
- [Export Rest Hours \[42\]](#)

- **Work Shifts**

The **Work Shifts** tab displays all shifts the seafarer was assigned to. You can also add and manage work shifts on this tab.

For more information on how to assign work shifts, see [Add Work Shifts \[44\]](#).

- **Performance**

On the **Performance** tab, you get an overview of the existing performance reports for the seafarer during his assignments. If the respective setting has been activated, you can confirm that you have read performance reports or create self-appraisals.



### NOTE

Contact the support team, if you require the confirmation of performance reports and creation of self-appraisals by seafarers.

- **Past Assignments**

The **Past Assignments** tab lists all assignments of the seafarer that took place in the past.

- **Experience**

On the **Experience** tab, you can manage the experiences that you gained during an assignment on board a vessel.

For more information on how to add gained experience, see [Add Experiences \[50\]](#).

- **Travel Expenses**

On the **Travel Expenses** tab, you get an overview of the travel expenses incurred for the current assignment.

As a seafarer, you can manage and add new travel expenses here. They are then listed on the **Travel expenses approval needed** card on the dashboard and need to be approved by the Captain of the vessel.

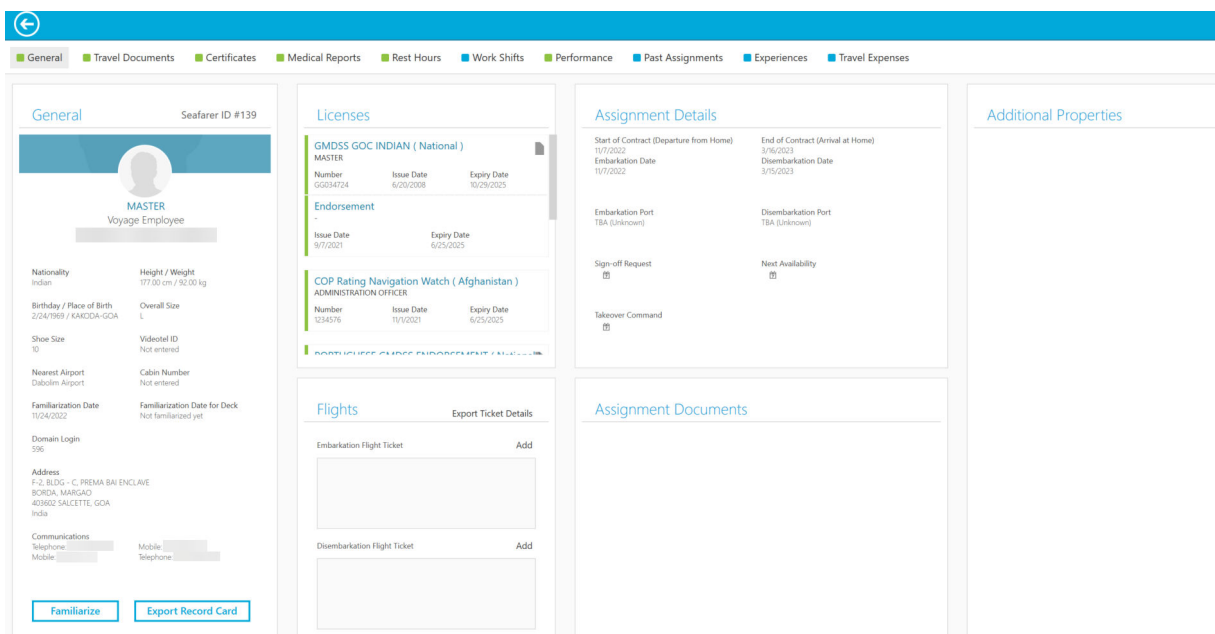
For more information on how to submit incurred travel expenses, see [Add Travel Expenses \[52\]](#).

## 4.1. General

On the **General** tab, you get a basic overview of the seafarer, including general information, such as date and place of birth, nationality, address, and communication details.

Available and missing licenses are also displayed as well as information on the current assignment and available flight information.

In addition, assignment-related details and documents are displayed as well as additional properties and flight documents that were necessary for the seafarer to (dis-)embark the vessel for this assignment.



The tab is divided into four cards:

- **General**

The **General** card displays generic information on the seafarer that is currently logged in to CSM.

This includes seafarer ID, nationality, height and weight, birthday, as well as address, types of communications and familiarization dates.

Familiarization dates are set by the Captain of the vessel, once the seafarer was informed about his duties for the current assignment. For more information, see [Confirm Familiarization of Seafarers \[15\]](#).

To export the seafarer record card including all information available on the seafarer that is currently logged in, choose [Export Record Card](#).

- **Licenses**

The **Licenses** card displays the required licenses for the current assignment.

Only the information on licenses that are required for the current assignment is synced between CSM Crewing and CFM.

The status of licenses is indicated by a color-coded ribbon:

- **Green**

The required license is available and valid.

- **Orange**

The required license is available, but due to expire soon.

- **Red**

The required license is available but has expired.

- **Purple**

The required license is missing.

For more information, see [Request Documents from CFM \[16\]](#).

- **Flights**

The **Flights** card allows you to add a sign-on and a sign-off ticket for the current assignment as an attachment. Additionally, you can export the flight ticket details to a PDF file by choosing [Export Ticket Details](#).

Alternatively, flight tickets can also be added by CFM Crewing users. These flight tickets may be necessary for the seafarer to embark, respectively disembark the vessel for the assignment.

For more information on how to add sign-on and sign-off tickets, see [Add Sign-on / Sign-off Tickets \[16\]](#).

- **Assignment Details**

The **Assignment Details** card displays generic information on the current assignment of the seafarer, such as embarkation date, embarkation port, and the start of the contract.

You can add a **sign-off request** by choosing the calendar icon (📅) and the corresponding date in the flyout window.

To define the date on which the seafarer is available for the next assignment, choose the calendar icon (📅) for **Next Availability** and select the corresponding date in the flyout window.

Further, you can specify the **Takeover Command** by choosing the calendar icon (📅) and the corresponding date in the flyout window.

- **Assignment Documents**

The **Assignment Documents** card displays document types for which the synchronization to CSM was enabled. Thus, seafarers onboard the vessel can be granted access to certain documents, such as contracts.

**NOTE**

Enable the synchronization of documents to CSM via CFM Crewing > [Settings](#) > [Documents](#) > [Assignment Documents](#).

- **Additional Properties**

The **Additional Properties** card displays the additional properties that were entered for the seafarer using CFM Crewing.

The information on this card is read-only. You cannot make any changes here.

#### 4.1.1. Confirm Familiarization of Seafarers

When seafarers start an assignment on board a vessel, they are provided with general and specific instructions on their duty.

To document this process, familiarization dates are entered into the system.

**NOTE**

If the familiarization dates are not entered, the seafarer appears in the **Missing Familiarization** list on the **Dashboard** of the **Crew** tile.

To do so, proceed as follows.

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the **General** tab.
4. On the **General** card, choose **Familiarize**.
5. In the flyout window, specify the following parameters:

The screenshot shows a flyout window with two date pickers. The first is labeled 'Familiarization date' and has the value '06.11.2020'. The second is labeled 'Familiarization rank date' and has the value '26.11.2020'. Below the date pickers are two buttons: 'Familiarize' and 'Close'.

- **Familiarization Date**

Enter the date on which the seafarer received general instructions for his current assignment. Choose the date picker (📅).

- **Familiarization Rank Date**

Enter the date on which the seafarer received specific instructions for the work in his rank. Choose the date picker (📅).

6. Choose **Familiarize** in the flyout window to save the dates.

### 4.1.2. Request Documents from CFM

Documents, such as licenses, are not automatically synced between CSM Crewing and CFM.



#### TIP

A global setting can make passports and seafarer books' attachments automatically available onboard.

Reach out to our Helpdesk to activate this setting for you.

In some cases, specific documents are required during an assignment on board the vessel, directly.

To request documents from CFM, proceed as follows.

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the tab on which you want to request the respective documents.
4. Choose the 📄 document icon next to the respective document.
5. Confirm the warning message.
- 6.



#### NOTE

The next steps are optional and can be carried out to speed up the sync process.

Navigate to the general CSM dashboard by choosing the ⬅️ **Back** icon.

7. On the dashboard, choose the **Submit changes** (🔄) tile to start the sync process directly.



#### NOTE

The tile is grayed out if no data is available that can be submitted.

### Result

The document icon turns orange indicating that the document is currently requested from the shore side (CFM) and will be available soon.

### 4.1.3. Add Sign-on / Sign-off Tickets

Add the sign-on and sign-off ticket information for the seafarer's current assignment.





**TIP**

You can export existing tickets to a PDF file by choosing **Export Ticket Details** in the upper right-hand corner of the **Flights** card.

To do so, proceed as follows.

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the **General** tab.
4. On the **Flights** card, choose **Add** next to the **Embarkation Flight Ticket** or **Disembarkation Flight Ticket** box.
5. In the dialog window, specify the following information:

## Add Sign off ticket

**Ticket status**

Unknown ▾

**Arrival Airport**

Mihail Kogălniceanu Internati

**Departure Airport**

**Details**

Attachments

ADD | DELETE

TOTAL Size
0B

Save

- **Ticket Status**

Select the applicable ticket status from the drop-down list:

- **Unknown**

By default, this status is selected.

- **Requested**

If a sign-on ticket was requested from the office but hasn't been issued, yet, select this status.

- **Issued**

If the sign-on ticket was issued and is available for the seafarer, select this status.

- **Departure Airport**

Enter the name of the departure airport in this field. The system offers you a list of predefined airports to choose from.

- **Arrival Airport**

Enter the name of the arrival airport in this field. The system offers you a list of predefined airports to choose from.



**NOTE**

The arrival airport is pre-filled with the **Nearest Airport** information of the seafarer for sign-off tickets.

- **Details**

Enter any additional flight details in this field.

- **Attachments**

Choose **Add** next to the **Attachments** box to attach the flight documents.

Once attached, you can display the document by choosing the **document** icon (📄).

To delete an existing attachment, select the entry from the box and choose **Delete**.

6. Choose **Save** to add the ticket to the assignment of the seafarer.

7. As a last step, the sign-on or sign-off ticket can be confirmed by the Captain for a better overview.

To do so, choose **Edit** next to the **Attachments** box and then **Confirm** in the dialog window.

Choose **Cancel Flight** if the seafarer's flight is organized i.e. by the master but the ticket will not be used for various reasons.

## 4.2. Travel Documents

The **Travel Documents** tab lists all passports, seaman books, and visas that are relevant for the seafarer.

Status	Number	Issue Place	Country	Issue Date	Expiry Date	Attachment
<b>Passport (2)</b>						
		PANAJI	Indian	11/6/2020	11/5/2030	📄
		Kabul	Afghan	11/1/2021		
<b>Seafarer's Book (4)</b>						
		MUMBAI	Marshall Islands	1/16/2020	1/15/2025	📄
		Hamburg	Aland Islands	10/5/2021		
		Kiel	National	11/1/2022	11/30/2024	
		MUMBAI	National	2/2/2017	2/1/2027	📄
<b>Visa (2)</b>						
			SCHENGEN VISA	11/14/2022	11/24/2026	📄
			U.S. VISA	6/6/2018	6/3/2023	📄

The travel documents are sorted according to their type: Passport, seaman book, visa, and so on.



### NOTE

Only the travel documents that are required for the current assignment are synced between CSM Crewing and CFM.

To request documents from CFM, see [Request Documents from CFM \[16\]](#).

Additionally, the documents are read-only and cannot be adapted.

The following information on each document is displayed:

- **Number**  
Displays the identification number of the travel document.
- **Issue Place**  
Indicates the location in which the document was issued.
- **Country**  
Indicates the country for which the document is valid, such as an Australian Visa.
- **Issue Date**  
Displays the date on which the document was issued.
- **Expiry Date**  
Displays the date on which the document expires.

The status of the travel documents is indicated with a color code next to every entry in the table:

- **Green**  
The travel document is available and valid.
- **Orange**  
The travel document is available, but due to expire soon.
- **Red**  
The travel document is available but has already expired.
- **Purple**  
The travel document is missing.

## 4.3. Certificates

The **Certificates** tab lists all general certificates required according to the STCW as well as medical certificates and vaccinations.

The screenshot shows two side-by-side cards. The left card, titled 'Certificates', displays a table of general certificates. The right card, titled 'Medical Certificates and Vaccinations', displays a table of medical certificates and vaccinations.

Status	Certificate	STCW	Issue Date	Expiry Date	Attachment
4	National (44)				
	01c ADVANCED FIRE FIGHTING		6/9/2007		
	07b ARPA / NARAS / NAEST (OPS)		12/2/2011		
	04 PERSONAL SAFETY AND SOCIAL RESPONSIBILITY 2010		7/30/2016		
	05b SHIP SECURITY OFFICER 2010		3/6/2014		
	09 ELECTRONIC CHART DISPLAY AND INFORMATION SYSTEM - 1.27		9/28/2012		
	06b SPECIALIZED TRAINING PROGRAM IN OIL TANKER OPERATIONS (TASCO)		8/21/2015		
	07a ROC / NARAS / NAEST (OPS)		12/2/2011		
	07c RANSCO / NAEST (MINTG)		12/2/2011		
	11 BRIDGE TEAM MANAGEMENT - 1.22		9/19/2008		
	08a GMDSS - GOC		6/20/2022	10/29/2025	
	INDOS		1/14/2004		

Status	Name	Country	Issue Date	Expiry Date	Attachment
4	Medicals (3)				
	MEDICALS - ILO&MLC/D&A/IV/V/USG	National	11/27/2020	11/26/2023	
		National	3/1/2022		
	MEDICAL - FLAG STATE	National	11/27/2020	11/26/2023	
4	Vaccinations (2)				
	YELLOW FEVER		5/3/2019		
	COVID-19		7/29/2021		

The tab is divided into two cards:



### NOTE

Only certificates and vaccinations that are required for the current assignment are synced between CSM Crewing and CFM.

To request certificates or vaccinations from CFM, see [Request Documents from CFM \[16\]](#).

Additionally, the certificates and vaccinations are read-only and cannot be adapted.

- **Certificates**

The **Certificates** card list all certificates required according to the STCW. The certificates that are listed are the ones relevant for the current assignment, only.

The following information is displayed on each certificate:

- **Certificate**

Indicates the name of the certificate.

- **STCW**

Indicates for which type of STCW regulation the certificate is valid.

- **Issue Date**

Displays the date on which the certificate was issued.

- **Expiry Date**

Displays the date on which the certificate expires.

- **Medical certificates and vaccinations**

The **Medical certificates and vaccinations** card lists all medical certificates and vaccinations that are required for the current assignment.

The following information is displayed on each certificate and vaccination:

- **Name**  
Indicates the name of the medical certificate or vaccination.
- **Country**  
Indicates the country for which the medical certificate is valid.
- **Issue Date**  
Displays the date on which the medical certificate or vaccination was issued.
- **Expiry Date**  
Displays the date on which the medical certificate or vaccination expires.

The status of the different certificates is indicated with a color code next to every entry on the cards:

- **Green**  
The certificate is available and valid.
- **Orange**  
The certificate is available but due to expire soon.
- **Red**  
The certificate is available but has already expired.
- **Purple**  
The certificate is missing.

## 4.4. Medical Reports

The **Medical Reports** tab gives you an overview of the existing medical reports for the seafarer and allows you to create new medical reports.

Reporting Date	Description / Symptoms	Illness / Injury Type	Examination History	Condition	Sign off	Examinations	Medicine	Attachments
11/24/2022	Broken leg	Fracture	24/11/2022 by Doctor	Unfit for duty	✈️	📁	🔍	
11/24/2022	Vomiting	Heat fatigue or stroke	24/11/2022 by Seafarer	Unfit for duty	✈️		🔍	
11/24/2022	Headache	Heat fatigue or stroke	24/11/2022 by Seafarer	Fit for light duty				

The following information on medical reports is displayed:

- **Reporting Date**  
Indicates the date on which the medical report was created.
- **Description / Symptoms**  
Displays a short description of the symptoms that occurred.
- **Illness / Injury Type**  
Displays the type of illness or injury, such as fracture or bruise.



**NOTE**

The illness / injury types available here are defined in CFM Miscellaneous under **General > Body Parts & Injury Types**. If nothing has been defined, you won't be able to fill out this field.

- **Examination History**

Displays the date on which an examination occurred and by whom, a doctor or a trained seafarer.

- **Condition**

Indicates whether the seafarer is still fit for duty or not. The following conditions can apply:

- **Fit for duty**

The illness or injury doesn't prevent the seafarer from working, such as a bruise.

- **Fit for light duty**

The illness or injury allows the seafarer to carry out only light tasks due to a sprained wrist.

- **Unfit for duty**

The illness or injury prevents the seafarer from working at all because he was sent to the hospital, for example.

- **Sign Off**

✈ - Indicates that the seafarer was recommended to be signed off by the examining seafarer or doctor.

If you hover over the icon a flyout window displays the following information:

✈	Sign off port	Sign off date	Date of repatriation
	no port selected	TBA	TBA
<a href="#">Click to show examinations of this seaman illness</a>			

- **Sign-off Port**

Indicates the port at which the seafarer is going to sign off the vessel.

- **Sign-off Date**

Displays the date on which the seafarer is going to sign off the vessel.

- **Date of Repatriation**

Displays the date on which the seafarer arrives in his hometown.



**TIP**

If you click in the flyout window, a dialog window appears displaying the examination details of the seafarer.

- **Examinations**



- Indicates that the seafarer was hospitalized due to his illness or injury.



**TIP**

If you click on the icon, a dialog window appears displaying the examination details of the seafarer.

• **Medicine**

- Indicates that the seafarer was prescribed medicine.



**TIP**

If you click on the icon, a dialog window appears displaying the prescribed medicine.

• **Attachments**

- Indicates that documents were attached to the medical report.



**TIP**

If you click on the icon, a dialog window displays the medical report's documents section.

**Filter**

Additionally, you can filter the table for the following parameters:

Text filter

Report Start  Report End

Seafarer ID

• **Text Filter**

Enter the name of a medical report or an illness / injury type to filter the table for medical reports that fit the entered keyword.

• **Report Start**

Enter a start date for medical reports to filter the table for reports created on the specified date.

• **Report End**

Enter an end date for medical reports to filter the table for reports finalized on the specified date.

• **Seafarer ID**

Enter the ID of a seafarer to filter the table for reports that were created for the specified seafarer.

### General Features

In general, you can do the following on this tab:

- Manage medical reports  
You can add, edit, and delete medical reports from this tab. For more information, see [Add Medical Reports \[24\]](#).
- Export medical reports  
You can export medical reports in the following formats:
  - **German Standard**
  - **Anonymised**
  - **TMAS Export**For more information, see [Export Medical Reports \[32\]](#).

#### 4.4.1. Add Medical Reports

To create medical reports for the seafarer that is currently logged in, proceed as follows.

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the **Medical Reports** tab.
4. Choose **Add** in the upper right corner above the table.



#### NOTE

You can also edit or delete existing medical reports. Choose a medical report from the table and choose **Edit** or **Delete** in the upper right corner.

5. In the dialog window, specify the following information:



←
Add Medical Report

---

■ General
■ Examination History
■ Documents
■ Prescribe Medicine

Description / Symptoms \*

Illness / Injury Type \*

▼

Case Is an Injury

Is Work-Related
 Is Caused by an Accident

Reporting Date \*

11/24/2022
📅

Sickness durations Add | Edit | Delete

Affected Body Areas

+

Remark

Finalize

Save

### General

- **Description / Symptoms**

Enter a description of the illness or injury that occurred or specify the symptoms of the seafarer.

- **Reporting Date**

Enter the date on which the illness or injury was reported. By default, the current date is predefined.

- **Illness / Injury Type**

Select the applicable illness / injury type from the drop-down list.



#### NOTE

The illness / injury types available here are defined in CFM Miscellaneous under **General > Body Parts & Injury Types**. If nothing has been defined, you won't be able to fill out this field.

- **Case is an injury**

Select this checkbox, if the medical report is created for an injury. Additionally, specify the following parameters:

- **Injury Category**

Select the applicable injury category from the drop-down list.

**NOTE**

Injury categories are predefined in the system and cannot be edited.

- **On Board Location**

Select the location on board the vessel where the injury occurred from the drop-down list.

**NOTE**

The on board locations available here are defined in CFM Miscellaneous under **General > Location on Board**. If nothing has been defined, you won't be able to fill out this field.

- **Is Work-Related**

Select this checkbox, if the illness or injury occurred while the seafarer was on duty.

- **Is Caused by an Accident**

Select this checkbox, if the illness or injury was caused by an accident.

- **Affected Body Areas**

To specify the body areas of the seafarer that are affected by the illness or injury, choose the ⊕ plus icon and select a body area from the drop-down list.

**NOTE**

The body areas available here are defined in CFM Miscellaneous under **General > Body Parts & Injury Types**. If nothing has been defined, you won't be able to fill out this field.

- **Remark**

Enter any additional remarks in this field.

- **Sickness Duration**

1. Specify sickness durations by choosing **Add** in the upper right corner of the area. If you're editing an existing medical report, select an existing sickness period and choose **Edit**.
2. In the dialog window, enter the following information:
  - **Sickness Start**  
Enter the start date of the sickness period.
  - **Sickness End**  
Enter the end date of the sickness period.
  - **Sickness Type**  
Select the type of sickness from the drop-down list.

**NOTE**

Sickness types are defined in CFM Crewing under [Settings > Miscellaneous > Personal History Types](#).

Sickness periods override all other periods. That means only the wage is paid for the entire period that was defined for the personal history type.

- **Condition**


Specify whether the seafarer can still carry out his task according to the examiner's diagnosis by choosing one of the following conditions from the drop-down list:

- **Fit for duty**
- **Fit for light duty**
- **Unfit for duty**

**NOTE**

Only if you select this condition, the sickness period is considered in the payroll and elements defined in the paycode matrix for the assigned wage are paid. Sickness periods are considered independent of the seafarer's assignment duration. That is in the event a seafarer was already signed off due to sickness CFM Crewing generates monthly payrolls as long as an active sickness period in condition **Unfit for Duty** is available.

- **Remark**

Enter any additional remarks in this field. The sickness period then gets a  remark icon.


3. Choose **Save** to save the sickness period.

6. Navigate to the **Examination History** tab and choose **Add** in the upper right corner. Enter the relevant information in the dialog window.

**NOTE**

You can also export examination histories by selecting the relevant one from the list and choosing **Export**.

For more detailed information on how to do this, see [Add Examination History \[28\]](#).

7. Navigate to the **Documents** tab and choose the  plus icon to add required documents or drag and drop the required documents into this area.

8. In the dialog window that appears, specify the following:

- **Name**

By default, the name is copied from the file name of the document. You can, however, adapt the name of the document.

- **Remark**  
Enter any additional remarks regarding this document in this field.
- **Is TMAS Document**  
Select this checkbox, if the attached document is relevant for Telemedical Maritime Assistance Service (TMAS).

9. Choose **Save** to save the changes to the attached document.



#### NOTE

You can view the attached document by choosing a document in this area.

10. Navigate to the **Prescribe Medicine** tab and choose **Prescribe** in the upper right corner to prescribe the medicine necessary for the treatment of the seafarer.



#### TIP

The report must be saved before prescribed medicine can be added.

11. In the dialog window, enter the following information:

- Select an item from the **Inventory Items** list.



#### NOTE

Adding inventory items only works, if you are also using CSM Pharmacy and a stock of items was maintained, accordingly.

- Enter the amount that you want to prescribe in the **Amount** field.
- Specify the date on which the medicine should be prescribed in the **Prescription Date** field.  
By default, the current date is predefined.
- Enter any additional remarks in the **Transaction Remark** field.
- Choose **Prescribe** to save your entries.

12. Once you have specified all required data for the medical report, choose **Finalize** in the lower left corner.

After finalizing a medical report, you can no longer edit any data or remove documents. You can, however, still attach documents to the medical report.

#### 4.4.1.1. Add Examination

To add an examination to a medical report, proceed as follows.

## CSM Crewing

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the **Medical Reports** tab.
4. Choose an existing medical report from the list and choose **Edit** or create a new medical report and choose **Add**.
5. In the dialog window navigate to the **Examination History** tab and choose **Add**.



### NOTE

You can also edit or delete an existing examination history. Select one from the **Examination History** tab and choose **Edit** or **Delete**.

6. Enter the relevant information in the dialog window:



**TIP**

When creating a medical report, it makes sense to specify only the **Date of Consultation** and then export the report so that the physician can fill out the rest. After the visit at the physician, the information can then be entered into the system and the completed report added as an attachment.

✕

## Add Examination

<p>Consultation Date *  <input style="width: 90%;" type="text" value="11/24/2022 12:23 PM"/></p> <p>Examination End  <input style="width: 90%;" type="text" value="Enter date"/></p> <p>Examiner *  <input style="width: 90%;" type="text"/></p> <p>Examiner's Name and Address  <input style="width: 90%; height: 40px;" type="text"/></p> <p>Diagnosis  <input style="width: 90%; height: 40px;" type="text"/></p> <p>Treatment / Investigation  <input style="width: 90%; height: 40px;" type="text"/></p> <p>Stay in patients room (days)  <input style="width: 90%;" type="text" value="0.0"/></p> <p>Condition  <input style="width: 90%;" type="text"/></p>	<p><input checked="" type="checkbox"/> Patient Is Recommended to Sign Off</p> <p>Sign off port  <input style="width: 90%;" type="text"/></p> <p>Sign off date  <input style="width: 45%;" type="text" value="Enter date"/></p> <p>Date of repatriation  <input style="width: 45%;" type="text" value="Enter date"/></p> <p><input checked="" type="checkbox"/> Hospitalized</p> <p>Name and Address of Hospital  <input style="width: 90%; height: 40px;" type="text"/></p> <p>Agent Details  <input style="width: 90%; height: 40px;" type="text"/></p> <p>Patient Contact Details  <input style="width: 90%; height: 40px;" type="text"/></p> <p>Next of Kin  <input style="width: 90%;" type="text"/></p> <p>Next of Kin - Contact Information  <input style="width: 90%; height: 40px;" type="text"/></p>
--	---

- **Consultation Date**  
Specify the date and time on which the seafarer was examined.
- **Examination End**  
Specify the date and time on which the examination was finished.
- **Examiner**  
Select a value from the drop-down list and thereby specify whether the examiner was a **Seafarer** or a **Doctor**.
- **Examiner's Name and Address**

Enter the examiner's name and address in this field.

- **Diagnosis**

Enter a description of the diagnosis in this field.

- **Treatment / Investigation**

Enter details regarding the treatment in this field.

- **Stay in Patients Room (Days)**

Enter the duration that the patient spent in the patient's room.

- **Condition**

Specify whether the seafarer can still carry out his tasks according to the examiner's diagnosis by choosing one of the following conditions from the drop-down list:


- **Fit for duty**
- **Fit for light duty**
- **Unfit for duty**

- **Patient recommended to be signed off**

Select this checkbox, if the seafarer should sign off the vessel due to his medical condition.

Specify the following additional information:

- **Sign-off Port**

Select the port where the seafarer should sign off from the drop-down list or choose the  calendar icon to choose a port from the vessel's schedule.

- **Sign-off Date**

Enter the date on which the seafarer signs off.



### NOTE

The medical report is independent of the corresponding assignment, which means that the information entered here doesn't lead to an automatic sign-off of the seafarer. The assignment itself must be updated accordingly.

- **Date of Repatriation**

Enter the date on which the seafarer is repatriated to his home country.

- **Next of Kin**

Select a next of kin from the drop-down list.



### NOTE

Next of kins are defined in CFM Crewing under [Seafarers > Particulars](#).

- **Next of Kin - Contact Information**

Enter the contact details of the selected next of kin in this field.



#### NOTE

If contact details of the next of kin are already available, they are displayed in this field.

- **Hospitalized**

Select this checkbox, if the seafarer needs to be hospitalized.

Specify the following additional information:

- **Name and Address of Hospital**

Enter the name and the address of the hospital in this field.

- **Agent Details**

Enter the details of the seafarer's agent in this field.

- **Patient Contact Details**

Enter the contact details of the seafarer in this field.

- **Next of Kin**

Select a next of kin from the drop-down list.

- **Next of Kin - Contact Information**

Enter the contact details of the selected next of kin in this field.

7. Choose **Save** to save your entries.

#### 4.4.2. Export Medical Reports

You can also export medical reports in different formats.

To do so, proceed as follows.

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the **Medical Reports** tab.
4. Choose **Export** above the table.



5. In the flyout window, specify the following parameter:

Newest entries first

Device according to list

Start of record

12.11.2020 10:46

German Standard

Anonymized

Close

- **Newest entries first**  
Select this checkbox, if the newest medical reports should be listed first.
- **Device according to list**  
Enter the name of the device which should be exported according to the list.
- **Start of record**  
Enter the date and time from when you want to export the medical reports.

6. Choose to which format you want to export the medical reports:

- **German Standard**



**TIP**

All texts are written in English and in German.

The export to **German Standard** includes a cover page with generic information on the vessel, shipowner, port of registry, devices according to the list, and the date on which the first record was entered.

A second sheet lists the details of each medical report that exists for the respective seafarer.

The following information is displayed:

**Table 1. Seafarer Illnesses**

Field	Value
Serial No.	1
Date of sick certificate	12.11.2020
Name, first name and date of birth of patient	TESTER, MICHAEL, 26.01.1985
Information	CHIEF OFFICER
Symptoms and findings	Amputation, Broken leg
Duration of stay in patient's room	-
Duration of disability for service	05.11.2020 - 20.11.2020

## CSM Crewing

Field	Value
Form of treatment and further course	Amputation
Days to stay isolated in room	5
Date of discharge from treatment	-
Comments on disinfections and other measures	-

- **Anonymized**

The export to the **Anonymized** format is identical with the **German Standard** except for the third column: **Name, first name and date of birth of patient**. This column displays the respective seafarer's ID instead of his full name and date of birth.

### TMAS Export

To export the medical reports to Telemedical Maritime Assistance Service (TMAS) format, proceed as follows.

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the **Medical Reports** tab.
4. Choose **TMAS Export** in the lower right corner.
5. In the dialog window, specify the following information:

Generate TMAS Export

Seafarer with Illnesses

CHIEF OFFICER

Illnesses

Start Date	Description	Illness / Injury Type	Visit Doctor	Condition
05.11.2020	Flu	Other		Flu <input checked="" type="checkbox"/>
05.11.2020	Broken leg	Amputation		Broken leg <input type="checkbox"/>
	Sprained ankle	Aggravated old injury		Sprained ankle <input type="checkbox"/>

Export

- **Seafarer with Illnesses**

By default, the respective seafarer is selected.

You can also choose to export a TMAS template. Then, select **Export TMAS template without seafarer information** from the drop-down list.

- **Illnesses**

Select the checkboxes next to every illness (medical report) that you want to export.

6. Choose **Export** to export the information to a Zip file.

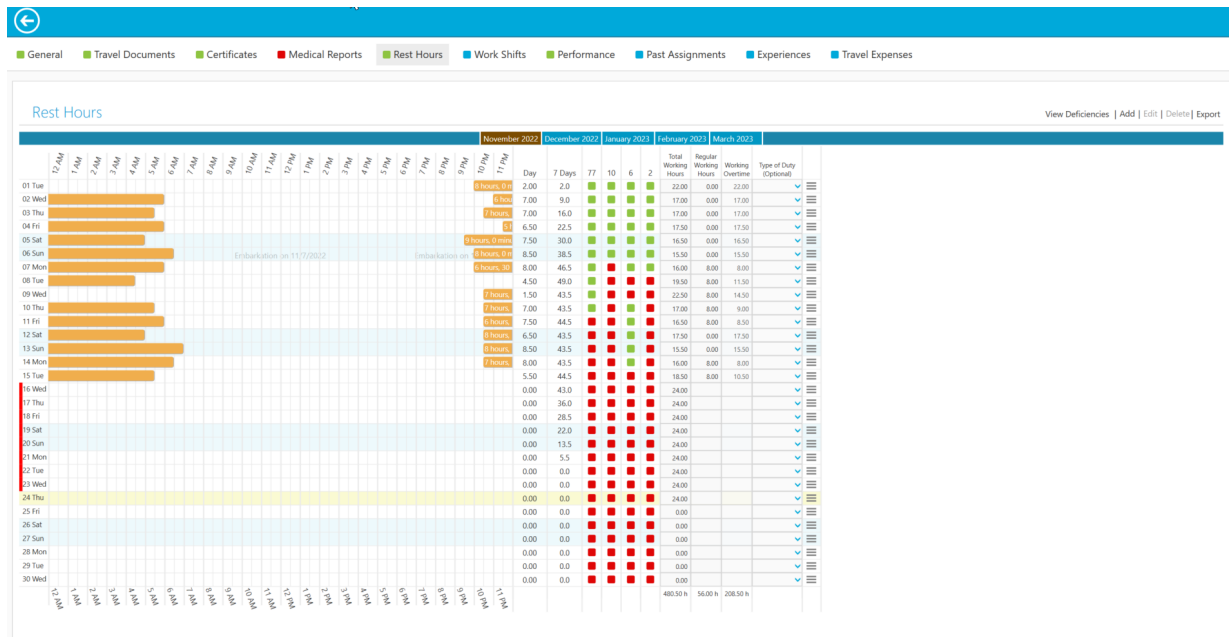
A success message appears: **The TMAS document will be attached to the selected illness.**

You can then send the filled out report to experts asking them for medical advice on the case. In Germany it is the company MEDICO in Cuxhaven.

## 4.5. Rest Hours

The **Rest Hours** tab displays the rest hours of the seafarer that is currently logged in. The rest hours are displayed for the current assignment.

The seafarer enters the rest hours himself which then must be confirmed by the Captain or any other eligible CSM user.



The following features are available on this tab:

- **View deficiencies**

A seafarer must have a minimum of 10 hours of rest over a period of 24 hours when they're working on an assignment.

If this requirement isn't met, an entry for each time the minimum hours of rest aren't achieved is recorded on the **Rest Hours** tab.

For a detailed view of these records, choose **View Deficiencies** above the table.

- **Manage rest hours**

You can add, edit, and delete rest hours from this tab.

- **Export rest hours**

You can export the rest hours in two formats:

- **With error status indicators**

If you choose this format, the export includes the status indicators for the different rest hour requirements that need to be met.

- **Without error status indicators**

If you choose this format, the export doesn't include the status indicators for the different rest hour requirements.

- **IMO ILO Model**

If you choose this format, the rest hours export is designed to meet the requirements according to the defined IMO ILO model.

The rest hours diagram displays the entered rest hours for every date and hours of the day. The data is grouped by month belonging to the current assignment. Each month represents a separate tab.

The **embarkation date** is displayed in light grey at the beginning of the diagram. At the end of the assignment, the **disembarkation date** is also displayed in light grey.

The colors of every entry in the diagram represent its status:

- **Blue**

Indicates that the rest hours are already approved by the Captain of the vessel.

- **Light blue**

Indicates that the rest hours were entered for a different assignment.

- **Orange**

Indicates that the rest hours were entered by the seafarer, but haven't been approved by the responsible Captain of the vessel, yet.

The columns in the diagram represent the following information:

- **Day**

Displays the sum of rest hours entered for the respective day.

- **7 Days**

Displays the sum of the rest hours entered for the 7 days in a row.

- **77**

A **green** icon indicates that the seafarer had at least 77 hours of rest over the last 7 days (168 hours) at any given point in time that he was working.

If the icon is displayed in **red**, the seafarer had less than 77 hours of rest.

- **10**

A **green** icon indicates that the seafarer had at least 10 hours of rest over the last 24 hours at any given point in time that he was working.

If the icon is displayed in **red**, the seafarer had less than 10 hours of rest.

- **6**

A **green** icon indicates that the seafarer had at least one period of at least 6 hours of rest over the last 24 hours at any given point in time that he was working.

If the icon is displayed in **red**, the seafarer had less than 6 hours of rest in one period.

- **2**  
A **green** icon indicates that the seafarer's main rest of ten hours was not split into more than two parts.  
If the icon is displayed in **red**, the seafarer's main rest of ten hours was split into more than two parts.
- **Total Working Hours**  
Indicates the total number of working hours per day.
- **Regular Working Hours**  
Indicates the regular number of working hours.  
By default, 8 hours is predefined by the system. You can, however, overwrite this value.
- **Working Overtime**  
Indicates the number of hours per day the seafarer worked overtime.
- **Type of duty (optional)**  
Indicates the type of duty that the seafarer performed. Specifying this information is optional.



### NOTE

If you don't require some of the available types of duty or you require additional ones, contact our Helpdesk.

The following abbreviations are available:

- **BW** - Bridge Watch (Master/OOW)
- **PP** - Passage Planning
- **CC** - Chart / Publication Corrections
- **MA** - Manoeuvring (Master)
- **LO** - Look-out
- **HM** - Helmsman
- **MO** - Mooring Operations
- **CW** - Cargo Watch
- **DW** - Deck Watch (non-officers)
- **TC** - Tank Cleaning
- **CO** - Cargo Operations
- **ST** - Taking Stores / Provisions
- **DM** - Deck Painting / Maintenance / Cleaning
- **EW** - Engine Watch
- **EM** - Engine Maintenance / Cleaning
- **HM** - Hospital Duties
- **FA** - First Aid Response

- **MC** - Medical Care
  - **CK** - Cook / Galley Duties
  - **PI** - Provision Inventory
  - **CA** - Catering Duties / Cabin Cleaning
  - **SI** - Safety Inspection
  - **A** - Administrative Duties
  - **S** - Supervision of works
  - **E** - Emergency Response
  - **D** - Drill (Safety / ISPS)
- ☰
- If the icon is displayed with a light blue background color, a remark for this rest hour entry exists.
- By choosing the icon, you can enter a remark to the respective rest hour entry in the dialog window.

### See Also

- [View Deficiencies \[38\]](#)
- [Add Rest Hours \[40\]](#)
- [Edit Rest Hours \[41\]](#)
- [Export Rest Hours \[42\]](#)

### 4.5.1. View Deficiencies

A seafarer must have a minimum of 10 hours of rest over a period of 24 hours when they're working on an assignment.

If this requirement isn't met, an entry for each time the minimum hours of rest aren't achieved is recorded on the **Rest Hours** tab. To view all deficiencies, choose **View Deficiencies** above the table.

Rest hour deficiencies BACK TO REST HOURS | EXPORT

				December 2019	January 2020	February 2020	March 2020	April 2020	May 2020
Type	Start	End	Description						
10	04.12.2019 06:00	04.12.2019 12:30	Seamen need at least 10 hours of rest over the last 24 hours at any given point in time they're working.						
10	04.12.2019 13:00	04.12.2019 21:30	Seamen need at least 10 hours of rest over the last 24 hours at any given point in time they're working.						
2	04.12.2019 15:00	31.12.2019 09:30	A seaman's main rest of ten hours must not be split into more than two parts.						
10	08.12.2019 05:00	08.12.2019 11:30	Seamen need at least 10 hours of rest over the last 24 hours at any given point in time they're working.						
10	24.12.2019 14:00	24.12.2019 19:30	Seamen need at least 10 hours of rest over the last 24 hours at any given point in time they're working.						
10	26.12.2019 21:30	27.12.2019 00:00	Seamen need at least 10 hours of rest over the last 24 hours at any given point in time they're working.						
6	30.12.2019 20:00	30.12.2019 20:30	Seamen need at least one period of at least 6 hours of rest over the last 24 hours at any given point in time they're working.						
10	31.12.2019 05:00	31.12.2019 09:30	Seamen need at least 10 hours of rest over the last 24 hours at any given point in time they're working.						
				8 Total number of deficiencies					
				16,73% Error percentage					

For every month of an assignment, the following information is displayed:

- **Type**  
Displays a number indicating the type of deficiency that was recorded.
- **Start**  
Displays the date and time on which the rest hours started.
- **End**  
Displays the date and time on which the rest hours ended.
- **Description**  
Displays the description of the recorded deficiencies.  
The following can occur:
  - **Seamen need at least 10 hours of rest over the last 24 hours at any given point in time they're working.**
  - **A seaman's main rest of ten hours must not be split into more than two parts.**
  - **Seamen need at least one period of at least 6 hours of rest over the last 24 hours at any given point in time they're working.**
  - **Seamen need at least 77 hours of rest over the last 7 days (168 hours) at any given point in time they're working.**
- **Total number of deficiencies**  
At the bottom of the table, the total number of deficiencies for each month of an assignment is displayed.
- **Errors in percentage**  
At the bottom of the table, the rest hours deficiencies are displayed as a percentage for each month of an assignment.

## 4.5.2. Add Rest Hours

To add rest hours for an ongoing assignment, proceed as follows.

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the **Rest Hours** tab.
4. The following two options to add rest hours are available:

### Option 1

- a. Choose a timeslot in the diagram directly and press and hold your mouse.
  - b. Move your mouse cursor to the left or right to expand or shorten the slot.
- The system automatically saves the rest hours that you added to the diagram.

### Option 2

- a. Choose **Add** in the upper right corner.
- b. In the dialog window, specify the following information:

- **Date**  
Enter the date on which you want to add rest hours.
- **Start**  
Enter the exact start time in the **h** and **min** fields.



### NOTE

You can only choose **0** or **30** in the **min** field to specify full or half hours.

- **End**  
Enter the exact end time in the **h** and **min** fields.



### NOTE

You can only choose **0** or **30** in the **min** field to specify full or half hours.



- **Hours**

The system automatically calculates the total period of rest hours added.

- To add another rest hour entry, simply select **Add**.  
A new row appears allowing you to enter another rest hour period.



**TIP**

You can also add another entry by choosing the **Copy** icon (📄).  
The entry you just created is then copied to the next day.  
To remove a row, choose the **Delete** icon (✕).

- Choose **Save** to save your entries.



**IMPORTANT**

You cannot save rest hours if any of the row's total is equal to 00:00h.

**Next Steps**

The newly created rest hours entries need to be reviewed and approved by the vessel's Captain or any other eligible CSM user.

The entries then appear in the **Unapproved Rest Hours** dashboard list.

As long as they're unapproved, the entries and the month to which they were added are displayed in orange.

**4.5.3. Edit Rest Hours**

To edit existing rest hours, proceed as follows.

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the **Rest Hours** tab.
4. The following two options to edit existing rest hours are available:



**NOTE**

You can also delete existing rest hours periods.  
To do so, select an existing period from the diagram and choose **Delete** in the upper right corner. Confirm the warning message.

**Option 1**

- Double-click directly on an existing rest hour period in the diagram.
- In the dialog window, you can change the following information:

**NOTE**

All rest hours that have already been approved by the Captain and are changed retroactively must be approved by the Captain again.

- **Start**  
Edit the start date and time of the selected rest hour period.
  - **Stop**  
Edit the end date and time of the selected rest hour period.
  - **Time**  
The duration of the complete rest hour period is automatically adapted once you've made your changes in the fields above.
  - **Non-rest period**  
Select this checkbox if the selected period shouldn't be considered as a rest hour period.
- c. Choose **Save** to save your changes.

**Option 2**

- a. Select an existing rest hour period from the diagram.
- b. Choose **Edit** in the upper right corner.
- c. Change the information as described in **step 4b** under option 1.
- d. Choose **Save** to save your changes.

#### 4.5.4. Export Rest Hours

You can export an overview of the seafarer's current rest hours.

To do so, proceed as follows.

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the **Rest Hours** tab.
4. Select the relevant month for which you want to export the rest hours details.
5. In the upper right corner, choose **Export** and select one of the two formats from the drop-down list:
  - **With error status indicators**  
If you choose this format, the export includes the status indicators for the different rest hour requirements that need to be met.
  - **Without error status indicators**  
If you choose this format, the export doesn't include the status indicators for the different rest hour requirements.
  - **IMO ILO Model**

## CSM Crewing

If you choose this format, the rest hours export is designed to meet the requirements according to the defined IMO ILO model.

### Result

The formats **with and without error status indicators** are exported to an MS Excel sheet that is made up of 3 sheets:

- **Rest Hours**

This sheet includes all information as is available on the **Rest Hours** tab.

Additionally, details on the relative seafarer and the vessel to which the seafarer was assigned are displayed.

- **Rest Hours (Compact)**

This sheet provides a compact overview of the rest hours reduced to the basic information. The detailed diagram and colored status indicators are excluded from this sheet.

- **Rest Hour Deficiencies**

This sheet lists all rest hour deficiencies that occurred during the month for which the export was made.

The details are the same as on the **Rest Hour Deficiencies** screen in CSM.

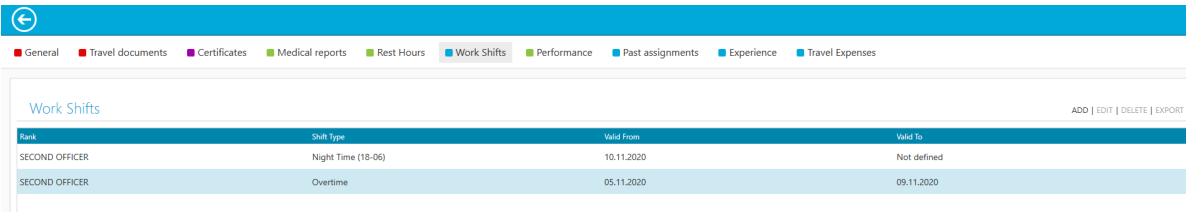
The **IMO ILO Model** export contains the information in a single sheet.

### See Also

- [Rest Hours \[35\]](#)
- [View Deficiencies \[38\]](#)

## 4.6. Work Shifts

The **Work Shifts** tab displays all shifts the seafarer was assigned to. You can also add and manage work shifts on this tab.



Rank	Shift Type	Valid From	Valid To
SECOND OFFICER	Night Time (18-06)	10.11.2020	Not defined
SECOND OFFICER	Overtime	05.11.2020	09.11.2020

You can use the **Work Shifts** tab to get an overview of when seafarers can be assigned to the same cabin in CSM Accommodations as they are assigned to the same shift or you can use it for documentary purposes.

The following features are available on this tab:

- Add work shifts
- Edit work shifts
- Delete work shifts

The following information is displayed on every work shift:

- **Rank**  
Displays the rank of the seafarer to which the work shift applies.
- **Shift Type**  
Displays the shift type of the work shift.  
The following are available:



### TIP

Shift types are defined in CFM Miscellaneous under **General > Types**. You can also define which shift types are compatible when seafarers stay in the same cabin in CSM Accommodations.

- **Night Time (18-06)**
- **Overtime**
- **Drill**
- **Mileage**
- **Day Time (06-18)**
- **Off Duty**
- **Valid From**  
Displays the date on which the work shift starts.
- **Valid To**  
Displays the date on which the work shift ends.

### 4.6.1. Add Work Shifts

To add work shifts to the ongoing assignment of a seafarer, proceed as follows.

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the **Work Shifts** tab.
4. Choose **Add** in the upper right corner.



### TIP

The initial work shift can already be added when performing a crew changeover. The first work shift is then automatically generated when the seafarer signs on to the vessel.

For more information, see [Perform Crew Changes \[77\]](#).

**NOTE**

You can also edit or delete existing work shifts. To do so, select a shift from the table and choose **Edit** or **Delete** in the upper right corner.

5. In the dialog window, specify the following information:

- **Work Shift Type**  
Select the applicable work shift type from the drop-down menu. The following types are available:
  - **Night Time (18-06)**
  - **Overtime**
  - **Drill**
  - **Mileage**
  - **Day Time (06-18)**
  - **Off Duty**
- **Valid From**  
Specify on which date the work shift should start.
- **Valid To** (optional)  
Specify on which date the work shift ends.

**NOTE**

This is optional as the shift automatically ends once you create a new work shift. The valid-to date is then the start date of the new shift minus 1 day.

6. Choose **Save** to save your entries.

## 4.7. Performance

On the **Performance** tab, you get an overview of the existing performance reports for the seafarer during his assignments. If the respective setting has been activated, you can confirm that you have read performance reports or create self-appraisals.

Performance Reports							ADD   DELETE   EXPORT
Regular Type	Officers / Engineers Good	Deck Ratings n/a	Leadership Excellent	Personality Excellent	Working Attitude Good	Overall Good	31.12.2019 Confirmed Finalized by vessel
Regular Type	Officers / Engineers Excellent	Deck Ratings n/a	Leadership Excellent	Personality Excellent	Working Attitude Excellent	Overall Excellent	29.02.2020 Confirmed Finalized by vessel
Regular Type	Officers / Engineers Excellent	Deck Ratings n/a	Leadership Excellent	Personality Excellent	Working Attitude Excellent	Overall Excellent	30.04.2020 Confirmed Finalized by vessel
End of assignment							Due: 15.05.2020

### Intervals

The reports can be created manually or in certain mandatory intervals based on settings made in the customer's database. If you want to define intervals, please contact our Helpdesk.

The system uses the date that is transferred from the database for the performance report interval. Possible formats are:

- mX - Month X in the year the data is transferred. Possible values for X are 1 to 12.
- Xm - X months after the start of the assignment
- Xd - X days after the start of the assignment
- e - At the end of the assignment
- eXd - X days before the end of the assignment
- eXm - X months before the of the assignment

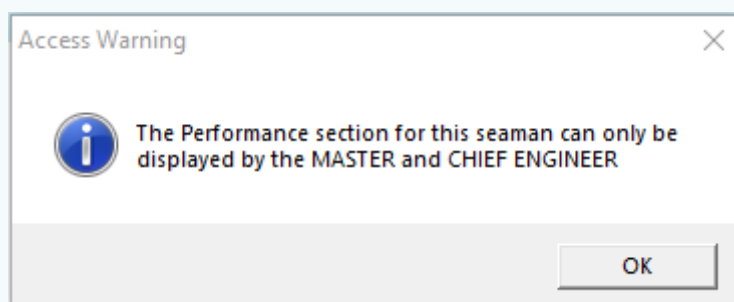
The performance reports that were created, but haven't been filled out, yet, are listed on the **Missing performance reports** card on the dashboard.

The following information on performance reports is displayed:

**NOTE**

Depending on the permissions assigned to and settings defined for your user account, you can view the performance reports that were created for you as a seafarer and you can create self-appraisals.

If you don't have the permissions to view performance reports, the following warning message is displayed:



In addition, you as a seafarer can indicate that you're recognizing the performance report.

- **Type of performance report**

There are two types of performance reports that can be created: **Regular** or **Self appraisal**. Regular performance reports are created by the Captain or head of department for the members of his crew.

Self-appraisals are created by the respective seafarer himself if the relevant permissions were assigned to his user account.

- **Rating categories**

The different rating categories available in performance reports are pre-defined for each customer. The rating categories can be either specific for a **rank**, such as Chief Engineer, or specific for a **rank group**, such as all seafarers that are assigned to the group **Deck** in CFM Crewing.

For each of the rating categories, different rating criteria and a rating scale are pre-defined, as well.

A rating for each customized rating category must be entered.

- **Overall rating**

Indicates the overall rating of the performance report.

- **End date of evaluation period**

Displays the end date of the evaluation period for the performance report.

- **Status of the performance report**

Displays whether the performance report was already confirmed and finalized by the vessel.

The following features are available on this tab:

- Add self-appraisals
- Edit self-appraisals



**NOTE**

Adding and editing self-appraisals is only possible, if these features were activated by the support team.

In case you require these features, contact the support team.

- View performance reports
- Delete performance reports
- Export performance reports

You can export existing performance reports to a PDF file.

Select a report from the list and choose **Export** in the upper right corner.

The PDF file includes all information of the selected performance report and allows you to print it out for signing.

## 4.8. Past Assignments

The **Past Assignments** tab lists all assignments of the seafarer that took place in the past.

Vessel	Rank	Embarkation Date	Disembarkation Date
[blurred]	MASTER	12/12/2021	2/28/2022
[blurred]	MASTER	8/13/2021	12/23/2021
[blurred]	MASTER	11/30/2020	4/29/2021
[blurred]	CHIEF OFFICER	1/10/2020	8/18/2020
[blurred]	CHIEF OFFICER	5/17/2019	9/2/2019
[blurred]	CHIEF OFFICER	6/20/2018	1/3/2019
[blurred]	CHIEF OFFICER	10/31/2017	2/7/2018
[blurred]	CHIEF OFFICER	4/8/2017	8/11/2017
[blurred]	CHIEF OFFICER	8/26/2016	12/16/2016
[blurred]	CHIEF OFFICER	1/23/2016	6/10/2016
[blurred]	CHIEF OFFICER	11/27/2015	12/7/2015
[blurred]	CHIEF OFFICER	12/21/2014	6/4/2015
[blurred]	CHIEF OFFICER	4/18/2014	9/7/2014

Past assignments are displayed for documentary purposes.



**NOTE**

The relevant permissions must be assigned to your user account to view this tab.

The following information is displayed on each assignment:

- **Vessel**



Indicates the name of the vessel on which the assignment took place.

- **Rank**

Indicates the rank the seafarer held during the assignment.

- **Embarkation Date**

Indicates the embarkation date of the assignment.

- **Disembarkation Date**

Indicates the disembarkation date of the assignment.

## 4.9. Experience

On the **Experience** tab, you can manage the experiences that you gained during an assignment on board a vessel.

Experience Type	Date	Experience Gained	Unit	Remark
Crane Handling	11/24/2022	12.00	hrs	Rejected
Crane Handling	11/24/2022	5.00	hrs	Approved

A banner at the top displays the total experience gained during the current assignment.

The following detailed information on experiences is displayed:

- **Experience Type**

Indicates the type of experience that was gained.



### NOTE

Experience types are defined in CFM Crewing under **Settings > Miscellaneous > Experience Types**.

- **Date**

Indicates the date on which the experience was gained.

- **Experience Gained**

Indicates how much of the specific experience the seafarer gained.

- **Unit**

Indicates the unit in which the experience was gained.

The unit depends on the settings made for the experience type. This can be days, hours, or a number.

- **Remark** (☰)

Indicates that a remark was added to the experience.

The following features are available on this tab:

- Add experiences
- Edit experiences
- Delete experiences

### 4.9.1. Add Experiences

To add experiences that a seafarer gained during his current assignment, proceed as follows.

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the **Experiences** tab.
4. Choose **Add** in the upper right corner.



#### NOTE

You can also edit or delete experience types. To do so, select an existing experience type from the list and choose **Edit** or **Delete**.

5. In the dialog window, specify the following information:

- **Experience Type**

Select the relevant type of experience from the drop-down list.



#### NOTE

Experience types are defined in CFM Crewing under **Settings > Miscellaneous > Experience Types**.

- **Date**

Enter the date on which the experience was gained.

By default, the current date is predefined by the system.

- **Experience Gained**

Enter how much of the specific experience the seafarer gained. The unit depends on the settings made for the experience type. This can be days, hours, or a number.

- **Remark**

Enter any additional remarks into this field.

6. Choose **Save** to save your entries.

**Next Steps**

Once the experiences are created, they must be approved by the Captain of the vessel.

Therefore, they are then listed on the **Experience approval needed** card on the dashboard of the **Crew** tile.

To reject an experience, open the seafarer's profile and navigate to the **Experiences** tab. Select the checkbox of the experience in question and select **Reject** at the bottom.

The approved experiences are then displayed in the **Additional experience** section of the respective seafarers in CFM Crewing under **Seafarers > Summary**.

## 4.10. Travel Expenses

On the **Travel Expenses** tab, you get an overview of the travel expenses incurred for the current assignment.

As a seafarer, you can manage and add new travel expenses here. They are then listed on the **Travel expenses approval needed** card on the dashboard and need to be approved by the Captain of the vessel.



**NOTE**

Processing travel expenses is a permission-dependent task. Office users can grant access to approve or reject travel expenses for seafarers on board a vessel. The related list in the dashboard is displayed or not according to the granted permissions.

Description	Date	Amount	Travel expense type	Attachments
Hotel Fee	05.11.2020	120.00 € (240.00 \$)	Food	
Dinner	04.11.2020	246.00 CAD (295.20)	Food	



**NOTE**

Travel expenses are only considered in the payroll of the relevant seafarer if they have been approved.

The following information on travel expenses is displayed:

- **Description**  
Displays a description of the travel expense.
- **Date**  
Displays the date on which the travel expense was added.
- **Amount**  
Displays the amount and currency of the travel expense.  
If the travel expense was created in a different currency than the local currency of the assignment. The system displays the converted amount relevant for the payroll.
- **Travel Expense Type**  
Displays the type of travel expense that was incurred.



### NOTE

Travel expense types are defined in CFM Crewing under [Settings > Miscellaneous](#).

- **Attachments** (📎)  
Indicates that attachments were added to the travel expense.  
You can view the attachment by choosing the **Attachments** (📎) icon.

The following features are available on this tab:

- Add travel expenses
- Edit travel expenses
- Delete travel expenses

### 4.10.1. Add Travel Expenses

To add travel expenses incurred during an assignment, proceed as follows.

1. Login to your CSM client.
2. Open the **Me** tile.
3. Navigate to the **Travel Expenses** tab.
4. Choose **Add** in the upper right corner.



### NOTE

You can also edit or delete travel expenses. Select a travel expense from the list and choose **Edit** or **Delete** in the upper right corner.

5. In the dialog window, specify the following information:

- **Assignment**  
Select the relevant assignment for which the travel expenses were incurred from the drop-down list. Choose the **Arrow** (∨) icon and select an entry from the list.  
By default, the system selects the current assignment.
- **Description**  
Enter a description for the travel expense. This could be the route of your flight, for example.
- **Date**  
Enter the date on which the travel expense was incurred by choosing the **Calendar** (📅) icon.  
By default, the system selects the current date.
- **Amount**  
Enter the amount of the travel expense in this field.
- **Currency**  
Select the currency in which the travel expense was incurred from the drop-down list.
- **Payroll Exchange Rate**  
Enter the exchange rate for the point in time the travel expense was incurred. The system then automatically calculates the exact amount that is added to the seafarer's payroll.

- **Payroll Relevant Amount (\$)**

This field is read-only. The relevant amount in payroll currency is automatically calculated based on the exchange rate and the amount of the travel expense.

- **Travel Expense Type**

Select the relevant travel expense type from the drop-down list by choosing the **Arrow** (∨) icon.

Then select the relevant type from the drop-down list.



### NOTE

Travel expense types are defined in CFM Crewing under **Settings > Miscellaneous**.

- **VAT Amount**

Enter the VAT amount that was paid as part of the travel expense.

- **Remark**

Enter any additional remarks in this field.

- **Document**

You can attach a document related to the travel expense in this area. Choose the ⊕ icon or drag and drop it into the area.

6. Choose **Save** to save your entries.

### Next Steps

Once the travel expenses are created, they must be approved by the Captain of the vessel.

Therefore, they are then listed in the **Travel expenses approval needed** card on the dashboard of the **Crew** tile.



### NOTE

Travel expenses are only considered in the payroll of the relevant seafarer if they have been approved.

Travel expenses that were approved after the corresponding payroll was already closed are automatically considered in the next payroll.

## 5. Crew

The **Crewing** tile allows you to carry out all crew-related processes relevant to the crew on board the vessel.

The screenshot displays the CSM Crewing dashboard with the following sections:

- Experience approval needed:** Shows 1 experience for MASTER and 1 experience for CHIEF OFFICER waiting for approval.
- Travel expenses approval needed:** Shows 2 travel expenses for CHIEF OFFICER waiting for approval.
- Missing rest hours / Deficiencies:** Lists crew members with their roles and days since last rest hours entered:
 

MASTER	130 Days	No rest hours entered
SECOND OFFICER	42 Days	No rest hours entered
THIRD OFFICER	44 Days	No rest hours entered
CHIEF ENGINEER	8 Days	No rest hours entered
SECOND ENGINEER	51 Days	No rest hours entered
ELECTRICIAN	8 Days	No rest hours entered
BOSUN	161 Days	No rest hours entered
AB	77 Days	No rest hours entered
AB	55 Days	No rest hours entered
OS	161 Days	No rest hours entered
OS	103 Days	No rest hours entered
FITTER	8 Days	No rest hours entered
OILER	22 Days	No rest hours entered
OILER	56 Days	No rest hours entered
COOK	161 Days	No rest hours entered
- Unapproved rest hours:** Shows 1 unapproved rest hour for CHIEF OFFICER and 1 unapproved rest hour for MASTER.
- Missing fa:** Lists crew members with their roles and days since last rest hours entered:
 

MASTER	130 Days	No rest hours entered
CHIEF OFFICER	42 Days	No rest hours entered
SECOND OFFICER	44 Days	No rest hours entered
THIRD OFFICER	8 Days	No rest hours entered
CHIEF ENGINEER	51 Days	No rest hours entered
SECOND ENGINEER	8 Days	No rest hours entered
ELECTRICIAN	161 Days	No rest hours entered
BOSUN	77 Days	No rest hours entered
AB	55 Days	No rest hours entered
AB	161 Days	No rest hours entered
OS	103 Days	No rest hours entered
OS	8 Days	No rest hours entered
FITTER	22 Days	No rest hours entered
OILER	56 Days	No rest hours entered
OILER	161 Days	No rest hours entered

It is divided into the following tabs:

- **Dashboard**

The dashboard in CSM Crewing works as your personal operations center and gives you an overview of useful information or tasks that need the responsible seafarer's attention (usually the Captain) during daily operations on board the vessel.

- **Crew List**

The **Crew List** tab provides an overview of the current crew on board the vessel.

- **Payroll**

The **Payroll** tab provides an overview of the payroll for the current and previous month of all seafarers that are on board the vessel.

- **Meals And Lodgings**

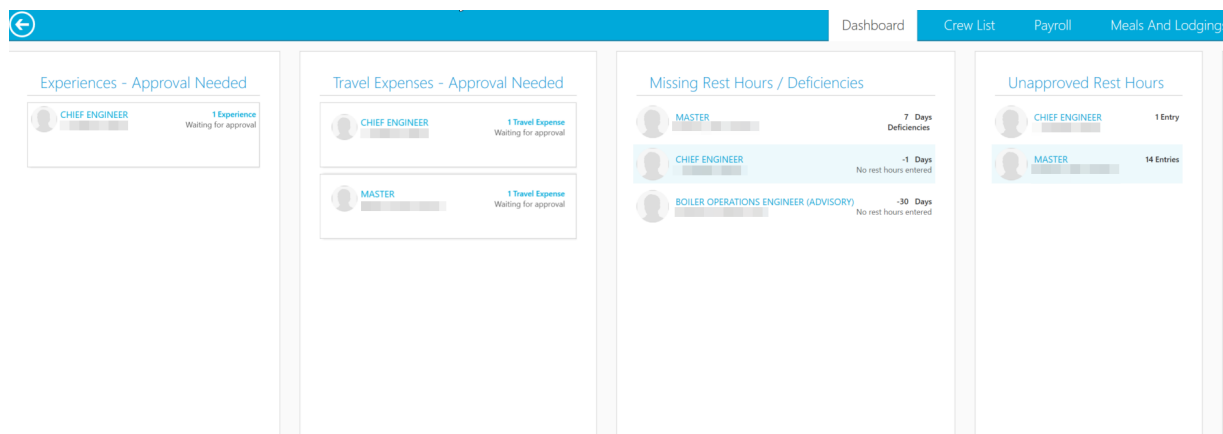
The **Meals And Lodgings** tab provides an overview of the registered meals for guests on board the vessel.

## 5.1. Dashboard

The dashboard in CSM Crewing works as your personal operations center and gives you an overview of useful information or tasks that need the responsible seafarer's attention (usually the Captain) during daily operations on board the vessel.

The information displayed on the dashboard reflects relevant data of the current assignment.

Lists are displayed only if the relevant permissions were granted and information or tasks need your attention.



### General Information

By choosing an entry from a card you directly navigate to the seafarer detail screen. Except for a few additional features, the tabs of the seafarer detail screen correspond to the ones on the **Me** tile.

For more information, see [Me \[11\]](#).

The dashboard is made up of the following different cards displaying crew-related information:

- Experience - Approval Needed**  
 Lists all seafarers of the current crew that gained additional experiences during the assignment.  
 For these experiences to take effect, they must be approved by the Captain of the vessel. Once all entries on this card are approved, the card disappears from the dashboard.
- Travel Expenses - Approval Needed**  
 Lists all travel expenses that were incurred by the seafarers of the current crew on board the vessel.  
 The Captain of the vessel must approve the travel expenses in order for them to be considered in the payroll of the relevant seafarers.



### NOTE

This list is only displayed when the appropriate permissions were granted.  
 Travel expenses that were approved after the corresponding payroll was already closed are automatically considered in the next payroll.



Once all entries on this card are approved, the card disappears from the dashboard.

- **Missing Rest Hours / Deficiencies**

Lists all seafarers for whom rest hours were not recorded or for whom deficiencies exist. The list displays entries for the last 7 days.

The respective seafarers then need to enter the missing rest hours and correct the deficiencies.

You can also accept deficiencies, but they will, nevertheless, remain on this list as long as the respective seafarer is on board the vessel during the ongoing assignment.

- **Unapproved Rest Hours**

Lists all seafarers for whom unapproved rest hours exist.

This means that the seafarer who is part of the current crew entered his rest hours, but they haven't been approved by the Captain of the vessel, yet.

- **Missing Familiarization**

Lists all seafarers for whom familiarization dates haven't been entered, yet.

Choose **Familiarize** next to the entry of a seafarer to enter the general familiarization date and the specific familiarization date for his respective rank.

Once you have specified all familiarization dates for all seafarers, the card disappears from the dashboard.

- **Recent Disembarked Seafarers**

Lists all seafarers that disembarked the vessel in the last 7 days.

This list allows you to directly navigate to the respective seafarers and make any necessary changes before the seafarers' data is no longer available in CSM.

- **Missing Performance Reports**

Lists all seafarers for whom performance reports are generated according to specific mandatory intervals.

The performance reports listed here haven't been filled out, yet.

Choose an entry from the list to open the respective performance report in a dialog window and specify the required data, accordingly.



### NOTE

The performance report must be finalized so that their data is synchronized to CFM Crewing.

- **Unfinalized Performance Reports**

Lists all seafarers for whom performance reports were created, but haven't been finalized, yet.

The card lists entries of the last 7 days.

Choose an entry from the list to open the respective performance report in a dialog window and choose **Finalize**.

- **Open Medical Reports**

Lists all seafarers' medical reports that are not finalized.

Choose an entry from the list to open the respective medical report in a dialog window and choose **Finalize**.

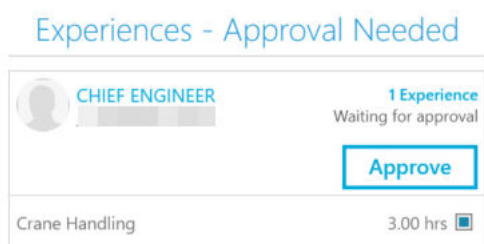
- **Upcoming Birthdays**

Lists all seafarers whose birthday is coming up in the next 7 days.

### 5.1.1. Experience - Approval Needed

The **Experience - Approval Needed** card lists all seafarers of the current crew that gained additional experience during the assignment.

For these experiences to take effect, they must be approved by the Captain of the vessel.



Each entry on the card displays the following information:

- **Picture**  
Displays a picture of the respective seafarer.
- **Rank**  
Indicates the rank the seafarer is holding during the current assignment.
- **Seafarer's name**  
Indicates the seafarer's first and last name.
- **Number of experiences**  
Indicates the number of experiences that the seafarer gained during the current assignment.
- **Experience Type**  
Displays the conducted experience type that awaits approval.
- **Gained Experience**  
Displays the amount of gained experience in the respective unit.

#### 5.1.1.1. Approve Experiences

To approve additional experiences that seafarers gained during the current assignment, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.

3. Choose an entry from the **Experience - Approval Needed** card.



#### TIP

You can also navigate into the seafarer record by double-clicking on an entry. Then open the **Experience** tab.

There, you can either approve or reject one or several entries from the list.

4. Select the checkboxes of the experiences that you want to approve.
5. Choose **Approve**.

#### Result

The selected experiences are approved and disappear from the **Experience - Approval Needed** card.



#### NOTE

Once all entries on this card are approved, the card disappears from the dashboard.

### 5.1.2. Travel Expenses - Approval Needed

The **Travel Expenses - Approval Needed** card lists all travel expenses that were incurred by the seafarers of the current crew on board the vessel.



The Captain of the vessel must approve the travel expenses in order for them to be considered in the payroll of the relevant seafarers.

**NOTE**

Processing travel expenses is a permission-dependent task. Office users can grant access to approve or reject travel expenses for seafarers on board a vessel. The related list in the dashboard is displayed or not according to the granted permissions.

Travel expenses that were approved after the corresponding payroll was already closed are automatically considered in the next payroll.

Travel Expenses - Approval Needed

 <b>CHIEF ENGINEER</b>	1 Travel Expense Waiting for approval	<input type="button" value="Approve"/>
Train	75.00 €	<input type="checkbox"/>
 <b>MASTER</b>	1 Travel Expense Waiting for approval	

Each entry on the card displays the following information:

- **Picture**  
Displays a picture of the respective seafarer.
- **Rank**  
Indicates the rank the seafarer is holding during the current assignment.
- **Seafarer's name**  
Indicates the seafarer's first and last name.
- **Number of travel expenses**  
Indicates the number of travel expenses that were incurred by the seafarer during the current assignment.
- **Description**  
Displays the travel expense's description.
- **Amount**  
Displays the incurred travel expenses.

### 5.1.2.1. Approve Travel Expenses

To approve travel expenses that were incurred by seafarers during the current assignment, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Choose an entry from the **Travel Expenses - Approval Needed** card.



### TIP

You can also navigate into the seafarer record by double-clicking on an entry. Then open the **Travel Expenses** tab.

There, you can either approve or reject one or several entries from the list.

4. Select the checkboxes of the travel expenses that you want to approve.
5. Choose **Approve**.

### Result

The selected travel expenses are approved and disappear from the **Travel Expenses - Approval Needed** card.



### NOTE

Once all entries on this card are approved, the card disappears from the dashboard.

### 5.1.3. Missing Rest Hours / Deficiencies

The **Missing Rest Hours / Deficiencies** card lists all seafarers for whom rest hours were not recorded or for whom deficiencies exist. The list displays entries for the last 7 days.

The respective seafarers then need to enter the missing rest hours and correct the deficiencies.

You can also accept deficiencies, but they will, nevertheless, remain on this list as long as the respective seafarer is on board the vessel during the ongoing assignment.

Missing rest hours / Deficiencies		
	MASTER [Redacted Name]	-130 Days No rest hours entered
	SECOND OFFICER [Redacted Name]	42 Days No rest hours entered
	THIRD OFFICER [Redacted Name]	44 Days No rest hours entered
	CHIEF ENGINEER [Redacted Name]	8 Days No rest hours entered
	SECOND ENGINEER [Redacted Name]	51 Days No rest hours entered
	ELECTRICIAN [Redacted Name]	8 Days No rest hours entered
	BOSUN [Redacted Name]	161 Days No rest hours entered
	AB [Redacted Name]	77 Days No rest hours entered
	AB [Redacted Name]	55 Days No rest hours entered
	OS [Redacted Name]	161 Days No rest hours entered
	OS [Redacted Name]	103 Days No rest hours entered
	FITTER [Redacted Name]	8 Days No rest hours entered
	OILER [Redacted Name]	22 Days No rest hours entered
	OILER [Redacted Name]	56 Days No rest hours entered
	COOK [Redacted Name]	161 Days

Each entry on the card displays the following information:

- **Picture**  
Displays a picture of the respective seafarer.
- **Rank**  
Indicates the rank the seafarer is holding during the current assignment.
- **Seafarer's name**  
Indicates the seafarer's first and last name.
- **Number of days**  
Indicates the number of days that no rest hours were entered.

## Manage Rest Hours / Deficiencies

1. Choose an entry from the list and you are directly navigated to the **Rest Hours** tab of the selected seafarer.
2. Check each month of the current assignment and enter the missing rest hours or fix the deficiencies.
3. Choose **Approve** to complete your entries.

### See Also

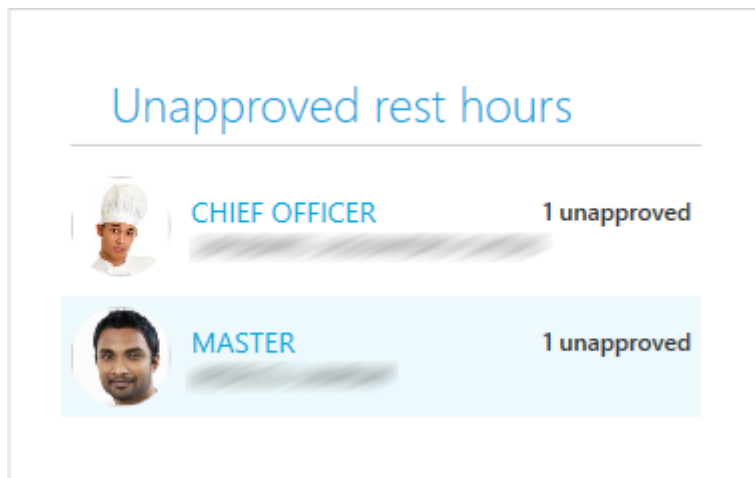
For detailed information on how to add rest hours, see

- [Rest Hours \[35\]](#)
- [View Deficiencies \[38\]](#)
- [Add Rest Hours \[40\]](#)
- [Edit Rest Hours \[41\]](#)

## 5.1.4. Unapproved Rest Hours

The **Unapproved Rest Hours** card lists all seafarers for whom unapproved rest hours exist.

This means that the seafarer who is part of the current crew entered his rest hours, but they haven't been approved by the Captain of the vessel, yet.



Each entry on the card displays the following information:

- **Picture**  
Displays a picture of the respective seafarer.
- **Rank**  
Indicates the rank the seafarer is holding during the current assignment.
- **Seafarer's name**  
Indicates the seafarer's first and last name.
- **Number of unapproved rest hours**

Indicates the number of rest hours that haven't been approved by the Captain of the vessel, yet.

### 5.1.4.1. Approve Rest Hours

To approve rest hours that were entered by a seafarer for the current assignment, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Choose an entry from the **Unapproved rest hours** card.  
You're then automatically navigated to the **Rest Hours** tab of the selected seafarer.
4. Go to the month in which the unapproved rest hours occur.



#### TIP

Unapproved rest hours are displayed in orange.

5. Adapt the rest hours, if necessary.
6. Choose **Approve**.

#### Result

The rest hours are approved and the entry disappears from the **Unapproved rest hours** card.


















#### NOTE

Once all entries on this card are approved, the card disappears from the dashboard.



### 5.1.5. Missing Familiarization

The **Missing Familiarization** card lists all seafarers for whom familiarization dates haven't been entered, yet.

Missing familiarization		
	MASTER	<a href="#">Familiarize</a>
	CHIEF OFFICER	<a href="#">Familiarize</a>
	SECOND OFFICER	<a href="#">Familiarize</a>
	THIRD OFFICER	<a href="#">Familiarize</a>
	CHIEF ENGINEER	<a href="#">Familiarize</a>
	SECOND ENGINEER	<a href="#">Familiarize</a>
	ELECTRICIAN	<a href="#">Familiarize</a>
	BOSUN	<a href="#">Familiarize</a>
	AB	<a href="#">Familiarize</a>
	AB	<a href="#">Familiarize</a>
	OS	<a href="#">Familiarize</a>
	OS	<a href="#">Familiarize</a>
	FITTER	<a href="#">Familiarize</a>
	OILER	<a href="#">Familiarize</a>
	OILER	<a href="#">Familiarize</a>

Each entry on the card displays the following information:

- **Picture**  
Displays a picture of the respective seafarer.
- **Rank**  
Indicates the rank the seafarer is holding during the current assignment.
- **Seafarer's name**  
Indicates the seafarer's first and last name.

#### Add Familiarization Dates

1. Choose **Familiarize** next to the entry of a seafarer.
2. Enter the general familiarization date in the **Familiarization Date** field.

- Enter the specific familiarization date for the task and rank of the seafarer in the **Familiarization date for xxx** field.

Once you've specified both familiarization dates for a seafarer, the respective entry disappears from the card.

Once you have specified all familiarization dates for all seafarers, the card disappears from the dashboard.

### See Also

[Confirm Familiarization of Seafarers \[15\]](#)

## 5.1.6. Recent Disembarked Seafarer

The **Recent Disembarked Seafarer** card lists all seafarers that disembarked the vessel in the last 7 days.

This list allows you to directly navigate to the respective seafarers and make any necessary changes before the seafarers' data is no longer available in CSM.

### Recent Disembarked Seafarers



Each entry on the card displays the following information:

- **Picture**  
Displays a picture of the respective seafarer.
- **Rank**  
Indicates the rank the seafarer held during the recent assignment.
- **Seafarer's name**  
Indicates the seafarer's first and last name.
- **Disembarkation date**  
Indicates the date on which the seafarer embarked the vessel.

## 5.1.7. Missing Performance Reports

The **Missing Performance Reports** card lists all seafarers for whom performance reports are generated according to specific mandatory intervals.

The performance reports listed here haven't been filled out, yet.

## Missing Performance Reports



CHIEF ENGINEER

Due Since : 2/19/2023  
End of Assignment

Each entry on the card displays the following information:

- **Picture**  
Displays a picture of the respective seafarer.
- **Rank**  
Indicates the rank the seafarer is holding during the current assignment.
- **Seafarer's name**  
Indicates the seafarer's first and last name.
- **Due date**  
Indicates the date on which the performance report is due.
- **Report type**  
Indicates the type of performance report that was generated.

### Intervals

The reports can be created manually or in certain mandatory intervals based on settings made in the customer's database. If you want to define intervals, please contact our Helpdesk.

The system uses the date that is transferred from the database for the performance report interval. Possible formats are:

- mX - Month X in the year the data is transferred. Possible values for X are 1 to 12.
- Xm - X months after the start of the assignment
- Xd - X days after the start of the assignment
- e - At the end of the assignment
- eXd - X days before the end of the assignment
- eXm - X months before the of the assignment

### Fill Out Performance Reports

1. Choose an entry from the list.  
The respective performance report then opens in a dialog window.
2. Enter all required data and evaluate the seafarer.
3. Choose **Save** to save your entries as a draft.

4. Choose **Finalize** to finalize the report and thus trigger the synchronization to CFM Crewing.

Once all performance reports are filled out, the card disappears from the dashboard.

### See Also

- [Performance \[46\]](#)
- [Add Performance Reports \[68\]](#)

#### 5.1.7.1. Add Performance Reports

To create performance reports, proceed as follows.



#### NOTE

As a Captain or Chief Engineer of the vessel, you cannot create performance reports for yourself.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Choose an entry from the **Missing Performance Reports** card.



#### TIP

If your user account was assigned the relevant permissions, you can also create performance reports by navigating into a seafarer record from the **Crew List** tab. On the **Performance** tab of the seafarer record, you can then create new performance reports.

A new performance report automatically opens in a dialog window.



#### NOTE

You can also edit or delete performance reports as long as they're not finalized by another user, yet. To do so, select a performance report from the list and choose **Edit** or **Delete** above the table.

4. In the dialog window, specify the following information:
  - **Start of Evaluation**  
Enter the start date of the evaluation period for the performance report.  
By default, the start date of the current assignment is predefined by the system.
  - **End of Evaluation**  
Enter the end date of the evaluation period for the performance report.  
By default, the current date is predefined by the system.

The end date of the evaluation period can never be later than the sign-off date of the seafarer.

- **Head of Department**

Select the head of department from the drop-down list.

By default, the system predefines the head of department according to the information in CFM Crewing.

You can, however, overwrite this information and choose another head of department according to the available chain of command.

- **Name of Master**

Select the name of the responsible master from the drop-down list.

By default, the system predefines the master with the current master that is on board the vessel.

If two masters are on board the vessel, you can choose between the two.

- **Should be Reemployed**

Select this checkbox, if the seafarer should be reemployed.

- **Needs briefing/debriefing**

Select this checkbox, if the seafarer for whom the performance report is created needs briefing or debriefing.

- **Needs training**

Select this checkbox, if the seafarer needs further training to carry out his tasks.

- **Should be Promoted**

Select this checkbox, if the seafarer should be promoted.

- **License available**

Select this checkbox, if the seafarer already has a license for a higher rank and could thus be promoted.

- **Necessary Training**

Specify the training that is required for the seafarer.



### NOTE

This field is mandatory if you selected the **Needs training** checkbox.

- **Document**

Add an attachment to the performance report by choosing the **plus** icon (⊕) or dropping the attachment into this field.

- **Vessel Remark**

As the Captain, you can enter any additional remarks in this field.



**NOTE**

Additional remarks that were made in the office using CFM Crewing are not displayed in the respective performance report on board the vessel.

- In the dialog window on the right, you rate the seafarer's performance for the customized rating categories.



**NOTE**

The criteria based on which the seafarers are rated are defined on data-base level. We define the criteria for every customer individually and we can define as many criteria as the customer requires.

As displayed in the screenshot, the rating categories could be the following, for example:

- **Officers / Engineers**
- **Leadership**
- **Deck Ratings**
- **Personality**
- **Working Attitude**

- Choose **Save** to save your changes.

**Add Performance report for SECOND OFFICER**

Start of Evaluation: 08/01/2022 | End of Evaluation: 07/02/2022

Head of Department: MASTER

Name of Master: MASTER

Should be Reemployed |  Should be Promoted

Needs Briefing/Debriefing |  License Available

Needs Training

Necessary Training: [Empty text area]

Document: [Click ADD or drop your document(s) here]

Vessel Remark: [Empty text area]

**Team Working** Avg: n/a

	Exception	Exceed	Meets	Needs	Unsatisfactory	Avg
Conflict resolution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Inclusiveness and consideration of others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Participation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Supporting others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a

**Communication and Influencing** Avg: n/a

	Exception	Exceed	Meets	Needs	Unsatisfactory	Avg
Feedback	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Persuasion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Shared understanding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Style of communication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a

**Situation awareness** Avg: n/a

	Exception	Exceed	Meets	Needs	Unsatisfactory	Avg
Awareness of external environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Awareness of time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Awareness of vessel system and crew	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a

**Decision Making** Avg: n/a

	Exception	Exceed	Meets	Needs	Unsatisfactory	Avg
Option generation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Outcome review	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Problem definition and Diagnosis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Risk assessment and option selection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a

**Results Focus** Avg: n/a

	Exception	Exceed	Meets	Needs	Unsatisfactory	Avg
Accountability and dependability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Determination	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Emotional toughness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Flexibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Initiative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a

**Leadership and Managerial skills** Avg: n/a

	Exception	Exceed	Meets	Needs	Unsatisfactory	Avg
Authority and assertiveness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Empowerment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Planning and coordination	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Providing and maintaining standards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Setting direction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a
Workload management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	n/a

**Buttons:** Save, Export

**Next Steps**

Performance reports must be finalized so that their data is synchronized to CFM Crewing.

### 5.1.7.2. Add Disciplinary Records

In addition to performance reports, you can also create disciplinary records for seafarers that misbehaved.

To do so, proceed as follows.



#### NOTE

This feature is not available on the **Me** tile.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Navigate to a card on the dashboard, for example **Missing Performance Reports**.
4. Choose a seafarer from the card to navigate to the seafarer detail screen.
5. Go to the **Performance** tab.
6. Choose **Add** above the **Disciplinary Records** section.



#### NOTE

You can also edit or delete disciplinary record. Select a record from the list and choose **Edit** or **Delete**.


7. In the dialog window, specify the following information:
  - **Title**  
Enter a meaningful title for the disciplinary record.
  - **Date**  
Specify the date on which the incident occurred.  
By default, the current date is predefined by the system.
  - **Disciplinary Type**  
Select the relevant disciplinary type from the drop-down list. This could be **1. Warning**, for example.



#### NOTE

The disciplinary types are predefined, but can be adapted if required.  
Contact our Helpdesk for changes.

- **Description**  
Enter a description explaining the reason for the disciplinary record.
- **Documents**

In the **Documents** section, you can add required documents by choosing the  icon, dragging and dropping the documents into this area, or choosing **Add** in the upper right corner.



### NOTE

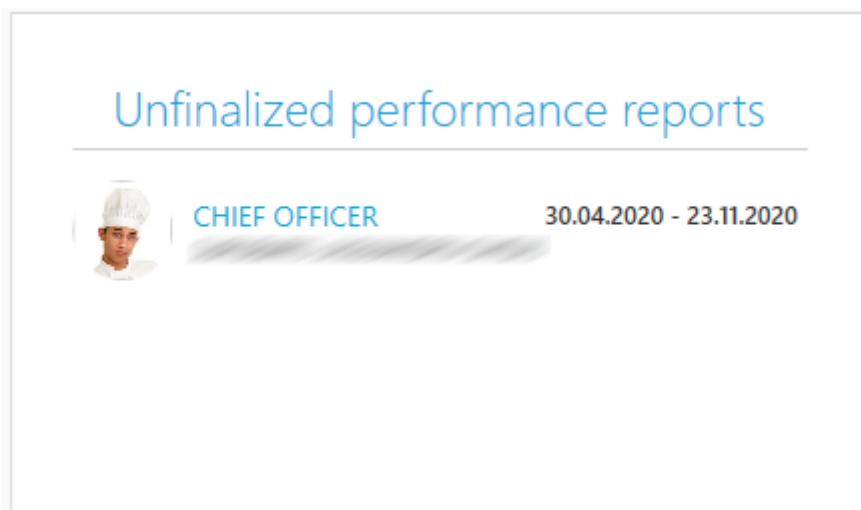
You can edit the file name after uploading the document to the system or delete it completely.

- Choose **Save** to add the disciplinary record to the selected seafarer record.

## 5.1.8. Unfinalized Performance Reports

The **Unfinalized Performance Reports** card lists all seafarers for whom performance reports were created, but haven't been finalized, yet.

The card lists entries of the last 7 days.



Each entry on the card displays the following information:

- **Picture**  
Displays a picture of the respective seafarer.
- **Rank**  
Indicates the rank the seafarer is holding during the current assignment.
- **Seafarer's name**  
Indicates the seafarer's first and last name.
- **Evaluation period**  
Indicates the dates for which the performance report is created.

### Finalize Performance Reports

- Choose an entry from the list.  
The respective performance report then opens in a dialog window.



2. Make any necessary changes to the report.
3. Once you're done, choose **Finalize**.

Once all reports are finalized, the card disappears from the dashboard.

### 5.1.9. Open Medical Reports

The **Open Medical Reports** card lists all seafarers for whom a medical report was created which is not finalized yet.



Each entry on the card displays the following information:

- **Picture**  
Displays the respective seafarer's picture.
- **Rank**  
Indicates the rank the seafarer is occupying during the current assignment.
- **Seafarer's Name**  
Displays the seafarer's first and last name.
- **Number of Open Reports**  
Indicates the respective seafarer's total number of open medical reports.
- **Status**  
Indicates the report's status. This is usually **To be Closed** as it is pending to be finalized.
- **Reporting Date**  
Displays the date on which the report was created.
- **Illness / Injury Type**  
Indicates the illness / injury type of the respective report.

Select **Show** to open the medical report. Apply necessary changes and choose **Finalize** to close the medical report.



## NOTE

Once all entries on this card are approved, the card disappears from the dashboard.

For more information on medical reports, see the following chapters:

- [Medical Reports \[21\]](#)
- [Add Medical Reports \[24\]](#)
- [Add Examination \[28\]](#)
- [Export Medical Reports \[32\]](#)

### 5.1.10. Upcoming Birthdays

The **Upcoming Birthdays** lists all seafarers whose birthday is coming up in the next 7 days.

#### Upcoming Birthdays

---



CHIEF ENGINEER

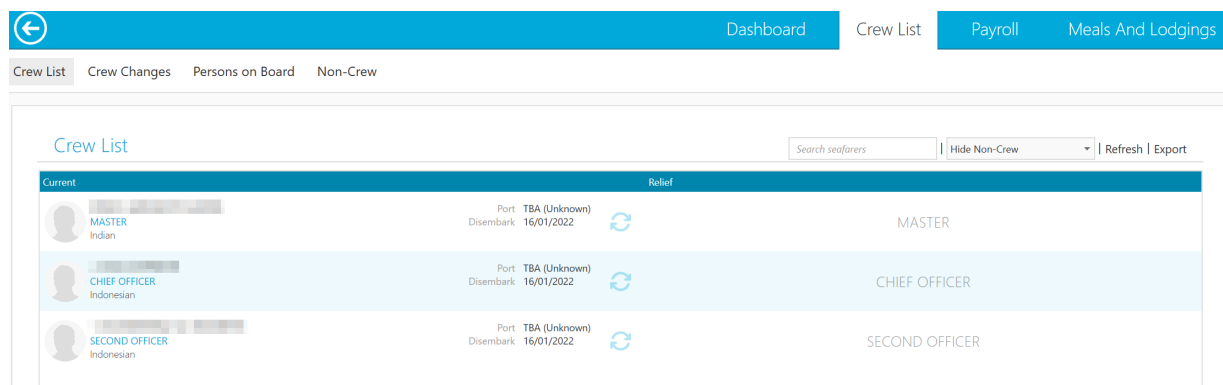
In 4 Days

Each entry on the card displays the following information:

- **Picture**  
Displays a picture of the respective seafarer.
- **Rank**  
Indicates the rank the seafarer is holding during the current assignment.
- **Seafarer's name**  
Indicates the seafarer's first and last name.
- **Days until Birthday**  
Indicates the days until the seafarer's birthday.

## 5.2. Crew List

The **Crew List** tab provides an overview of the current crew on board the vessel.



It is divided into the following subtabs:

- **Crew List**

The **Crew List** subtab provides an overview of the status quo of the crew on board the vessel, their upcoming relievers and allows you to perform crew changes.

- **Crew Changes**

The **Crew Changes** subtab, gives you an overview of the crew destined to sign off or being relieved by other seafarers from a specific date. It displays the number of offsigners as well as onsigners sorted according to the rank order configuration made in CFM Crewing.

- **Persons on Board**




The **Persons on Board** subtab lists all persons that are currently on board the vessel including their actual status. The list includes crew members as well as non-crew members and is used for security purposes, if there is an issue or a crew member is missing, for example.

- **Non-Crew**

The **Non-Crew** subtab lists all persons that are on board the vessel, but don't belong to the crew. These persons can include passengers or technicians, for example. You can also add new non-crew members, manage their sign-on and sign-off dates. In addition, you can import a list of non-crew members and export the list of non-crew members to an MS Excel spreadsheet.

## 5.2.1. Crew List

The **Crew List** subtab provides an overview of the status quo of the crew on board the vessel, their upcoming relievers and allows you to perform crew changes.

Current	Relief
 <b>MASTER</b> Indian	Port: TBA (Unknown) Disembark: 16/01/2022
 <b>CHIEF OFFICER</b> Indonesian	Port: TBA (Unknown) Disembark: 16/01/2022
 <b>SECOND OFFICER</b> Indonesian	Port: TBA (Unknown) Disembark: 16/01/2022

It displays the current seafarers on board as well as the planned relief.



### NOTE

If you want to display only the data of assignments and their corresponding crew that was confirmed by the office using CFM Crewing, contact our Help-desk.

Basic information on every seafarer is displayed in a table divided into **Current** and **Relief**:

- **Picture**  
Displays a picture of the respective seafarer.
- **Name**  
Indicates the seafarer's first and last name.
- **Rank**  
Indicates the rank the seafarer is holding during the current assignment.
- **Nationality**  
Indicates the seafarer's nationality.
- **Port**  
Indicates the port at which the seafarer embarks or disembarks the vessel.
- **Embarkation or disembarkation date**  
The system displays the disembarkation date for the current crew and the embarkation date for their relievers.

The following features are available on this subtab:

- Filter the table for a specific crew member by entering the seafarer's first or last name in the search bar on top of the table.
- Sort the crew list according to the following options in the drop-down list above the table:

- **All**  
Displays all persons that are currently on board the vessel.
- **Hide Non-Crew**  
Excludes non-crew personnel, such as technicians.  
This option is selected, by default.
- **Non-Crew only**  
Displays non-crew personnel, only.
- Refresh the crew list without reloading the entire subtab by choosing **Refresh**.  
This feature is useful if more than one user is working on the crew list.
- Export the crew list into different formats.
- Perform crew changes by choosing the crew change over icon (↻).



### NOTE

This feature is only available, if the corresponding permissions were assigned to your user in CFM Ship Client Management.

Once you choose a seafarer from the table, a sidebar opens displaying details on the seafarer's assignment. The sidebar allows you to manage embarkation or disembarkation flight tickets directly from the subtab without the need to navigate.

To view the seafarer's details, choose **Show details**. Then you're automatically redirected to the detail screen of the respective seafarer.

Alternatively, double-click on a seafarer in the table to navigate to the seafarer detail screen.

Except for a few additional features, the tabs of the seafarer detail screen correspond to the ones on the **Me** tile.

### See Also

- [Me \[11\]](#)
- [Perform Crew Changes \[77\]](#)
- [Export Crew Lists \[80\]](#)
- [Add Sign-on / Sign-off Tickets \[16\]](#)

### 5.2.1.1. Perform Crew Changes

To carry out a crew change of a current crew member and his reliever, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Navigate to the **Crew List** subtab.

- Choose the crew change over icon (↻) and specify the following information in the dialog window:

←
Crew Changes

**Current** embarked 7/3/2022

CHIEF ENGINEER

Disembarks

Disembarkation Date \*

Disembarkation Port \*

End of Contract (Arrival at Home) \*

Next Availability

Cabin Number

Sign-off Reason

Remark

**Relief**

CHIEF ENGINEER

Embarks

Start of Contract (Departure from Home) \*

Embarkation Port \*

Embarkation Date \*

Initial Work Shift

Cabin Number

Remark

Save

**⚠ CAUTION**

The checkboxes above the current crew member and his reliever must be selected in order for the change over to work properly.

If you deselect one of the checkboxes, you can still edit data of the respective seafarer without carrying out an actual change over.

**Current**

- **Current seaman disembarks**  
The checkbox is set, by default. If you deselect the checkbox, the current crew member is not considered for the crew change over.
- **Disembarkation date**  
The disembarkation date is predefined according to the assignment details of the seafarer. You can, however, overwrite the disembarkation date.  
The disembarkation date must always be before the **End of Contract (Arrival at Home)** date.
- **Disembarkation port**  
Specify the port at which the seafarer disembarks the vessel.  
By default, **TBA (Unknown)** is set by the system. If you're using CFM Schedules and have maintained a schedule for the selected vessel, you can choose the 📍 position

icon and select the relevant port from the planned schedule. Otherwise, select a port from the drop-down list.

- **End of Contract (Arrival at home)**

The end of contract date is predefined according to the assignment details of the seafarer. You can, however, overwrite the end of contract date.

- **Next availability**

The date at which the seafarer is available again is predefined according to the assignment details of the seafarer. You can, however, overwrite the end of contract date.

- **Cabin Number**

Enter the cabin number for the cabin in which the seafarer stays.



### NOTE

You can only enter the cabin number if you are not using CSM Accommodations. Otherwise, this field is read-only.

- **Sign-off Reason**

Select the reason why the seafarer disembarked the vessel.

- **Remark**

Enter any additional remarks in this field.

### Relief

- **Relief seaman embarks**


The checkbox is set, by default. If you deselect the checkbox, the reliever is not considered for the crew change over.

- **Start of Contract (Departure from home)**

The start of contract date is predefined according to the assignment details of the seafarer. You can, however, overwrite the start of contract date.

- **Embarkation port**

Specify the port at which the seafarer embarks the vessel.

By default, **TBA (Unknown)** is set by the system. If you're using CFM Schedules and have maintained a schedule for the selected vessel, you can choose the  position icon and select the relevant port from the planned schedule. Otherwise, select a port from the drop-down list.

- **Embarkation date**

Enter the date on which the seafarer embarks the vessel.

The embarkation date is predefined according to the assignment details of the seafarer. You can, however, overwrite the embarkation date.

- **Initial Work Shift**

Select the first work shift of the seafarer from the drop-down list.

When the seafarer signs onto the vessel, the initial work shift is automatically generated by the system if you have maintained a value in this field.

**NOTE**

Work shifts can be managed via CFM Miscellaneous > **General** > **Types** > **Shift Types**.

- **Cabin Number**

Enter the cabin number for the cabin in which the seafarer stays.

**NOTE**

You can only enter the cabin number if you are not using CSM Accommodations. Otherwise, this field is read-only.

- **Remark**

Enter any additional remarks into this field.

5. Choose **Save** to save your changes.

**NOTE**

If mandatory performance reports are missing when you perform the crew change over, the system will warn you before doing the change over.

**Result**

Once you disembark a seafarer without on-signing his reliever, the entry disappears from the crew list table as long as it isn't required according to the minimum safe manning defined in your settings in CFM Crewing.

If you disembark a seafarer and sign on his reliever, the reliever takes the position of the off-signer in the table.

**5.2.1.2. Export Crew Lists**

To export the list of current crew members to different formats, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Navigate to the **Crew List** subtab.
4. Choose **Export** above the table and select one of the following formats from the drop-down list:



- **IMO Crew List**

Exports specific data on the current crew to an MS Word file depending on the values defined in the dialog window:



### NOTE

This export only returns the position of non-crew person instead of their category as well.

←  
IMO Crewlist

Date: 24.11.2020

Current Port: TBA (Unknown)

Port arrived from: TBA (Unknown)

Voyage number: 044B

Arrival     Departure     include passport     seamenbook

Export

- **Date**

Enter the date on which the crew list should be exported.

- **Current Port**

Enter the current port at which the crew is located and which you want to use in the export.

- **Port arrived from**

Enter the port from which you arrived.

- **Voyage Number**

Enter the voyage number of the voyage that the crew is currently on.

- **Arrival**

Choose this radio button, if you want to include all seafarers that were on board the vessel prior to arrival at a port, only.

- **Departure**

Choose this radio button, if you want to include all seafarers that were on board the vessel after departure from the port, only.

- **Include Passport**

Choose this radio button, if you want to include information on the seafarers' passports.

- **Include Seaman's Books**

## CSM Crewing

Choose this radio button, if you want to include information on the Seaman's Book of the seafarers.

- **Dynamic Crew List**

Exports a dynamic crew list to an MS Excel spreadsheet depending on the values that you specified in the dialog window:



### NOTE

This export only returns the position of non-crew person instead of their category as well.

Dynamic Crewlist

- Surname
- Name
- Name [First Name Middle Name Surname]
- Name [Surname, First Name Middle Name]
- Name [Middle Name]
- Name [First Name Middle Name Initials]
- Company
- Rank (position for external people)
- Nationality
- Nationality [ISO 3166-3]
- Sex
- Category
- Familiarization date
- Familiarization rank
- Passport no.
- Date of birth
- Place of birth
- Seamanbook number
- Flagstate seamanbook number
- Vaccinations
- Next of kin surname
- Next of kin name
- Next of kin phone no.
- Date of embarking the vessel
- Port or place of embarkation
- Date of disembarking the vessel
- Port or place of disembarkation
- Cabin Number

Export

- **Surname**

The surname of the seafarer is included in the export, by default.

- **Name**

The first name of the seafarer is included in the export, by default.

- **Name [First Name Middle Name Surname]**

- **Name [Surname, First Name Middle Name]**

- **Name [Middle Name]**

- **Name [First Name Middle Name Initials]**

- **Company**

The company for which the seafarer is working is included in the export, by default.

- **Rank (position for Non-Crew)**

The rank the seafarer is holding during the current assignment is included in the export, by default.

- **Nationality**

The nationality of the seafarer is included in the export, by default.

- **Nationality [ISO 3166-3]**

- **Sex**

- **Category**

- **Familiarization date**

- **Familiarization rank**

- **Passport No.**

- **Date of birth**

- **Place of birth**

- **Seamanbook number**

- **Flagstate seamanbook number**

- **Vaccinations**

- **Next of kin surname**

- **Next of kin phone no.**

- **Date of embarking the vessel**

- **Port or place of embarkation**

- **Date of disembarking the vessel**

- **Port or place of disembarkation**

- **Cabin Number**

- All additional property types that are available in CSM Crewing

- **Crew List Declaration**

Exports the crew effects declaration specified by the Captain of the vessel for the current assignment.

The data is exported to an MS Word file.



### NOTE

This export only returns the position of non-crew person instead of their category as well.

- **ISF Watchkeeper Crew Export**

Exports general seafarer-/ and assignment-related information, such as first and last name, rank as well as (dis-)embarkation dates. The generated file can then be imported to *ISF Watchkeeper* which relieves you from entering this data manually.

- **Rest Hours (Bulk)**

Exports a particular month's rest hours for all seafarers onboard the vessel in your desired format, such as ILO IMO. The export contains each seafarer's rest hours in a dedicated sheet.

### 5.2.2. Crew Changes

The **Crew Changes** subtab, gives you an overview of the crew destined to sign off or being relieved by other seafarers from a specific date. It displays the number of offsigners as well as onsigners sorted according to the rank order configuration made in CFM Crewing.

Rank	Date	Seafarer	Port	Status	Ticket Status
MASTER	27/03/2022	[Redacted]	TBA (Unknown)	Embarking	
MASTER	31/03/2022	[Redacted]	TBA (Unknown)	Disembarking	
MASTER	27/04/2022	[Redacted]	TBA (Unknown)	Disembarking	
MASTER	23/09/2022	[Redacted]	TBA (Unknown)	Disembarking	
CHIEF OFFICER	28/05/2022	[Redacted]	TBA (Unknown)	Disembarking	
CHIEF OFFICER	31/07/2022	[Redacted]	TBA (Unknown)	Disembarking	
SECOND OFFICER	27/05/2022	[Redacted]	TBA (Unknown)	Disembarking	
THIRD OFFICER	28/05/2022	[Redacted]	TBA (Unknown)	Disembarking	

The following information is displayed on the seafarers:

- **Picture**  
Displays a picture of the respective seafarer.
- **Rank**  
Indicates the rank the seafarer is holding during the current assignment.
- **Embarkation or disembarkation date**  
The system displays the embarkation date for the relievers and the disembarkation date for the current crew members that are signing off the vessel.
- **Name**  
Indicates the seafarer's first and last name.
- **Port**  
Indicates the port at which the seafarer embarks or disembarks the vessel.
- **Status**  
Indicates whether the seafarer is embarking or disembarking the vessel soon.  
An arrow icon (← or →) next to the seafarer's picture also indicates whether he is embarking or disembarking the vessel.
- **Status of the flight ticket**  
Indicates the status of the flight ticket for the seafarer.

The following general features are available on this subtab:

- Filter the crew changes table for a specific seafarer by entering the seafarer's first or last name in the **Seafarer** field of the filter (☰).
- Filter the crew changes table for a specific date by entering it in the **Crew Changes Until** field of the filter (☰).

By default, the date is set to the current date in one year.

- Sort the crew list according to the following options:
  - **All**  
Displays all persons that are currently on board the vessel.
  - **Hide Non-Crew**  
Excludes non-crew personnel, such as technicians.
  - **Non-Crew only**  
Displays non-crew personnel, only.
- Export the crew changes into different formats



### NOTE

Be aware that your export file will reflect your applied filters.

### 5.2.2.1. Export Crew Changes

To export the crew changes list to different formats, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Navigate to the **Crew Changes** subtab.
4. Choose **Export** above the table and select one of the following formats from the drop-down list:
  - **Crew Changes**  
Exports the data from the crew changes list to an MS Excel spreadsheet.



### NOTE

This export only returns the position of non-crew person instead of their category as well.

- **Travel Plan**  
Exports the data from the crew changes list including additional information such as the seafarer's flight details, contact to his manning agency, personal email and phone number.  
This export is useful in cases where the Captain of the vessel is also responsible for the travel plans of his crew members.



**NOTE**

This export only returns the position of non-crew person instead of their category as well.



**NOTE**

Be aware that your export file will reflect your applied filters.

### 5.2.3. Persons on Board

The **Persons on Board** subtab lists all persons that are currently on board the vessel including their actual status. The list includes crew members as well as non-crew members and is used for security purposes, if there is an issue or a crew member is missing, for example.

Name	Rank	Position	Company	Embarkation Date	Disembarkation Date	Assignment Status
[REDACTED]	MASTER			08/01/2022	16/01/2022	On Board
[REDACTED]	CHIEF OFFICER			08/01/2022	16/01/2022	On Board
[REDACTED]	SECOND OFFICER			08/01/2022	16/01/2022	On Board

On Board: 3      On Shore Leave: 0      Working Alongside: 0

The following information is displayed on each entry:

- **Name**  
Indicates the seafarer's first and last name.
- **Rank**  
Indicates the rank the seafarer is holding during the current assignment.
- **Position**  
Indicates the position of the non-crew person on board the vessel.  
This field is only relevant for externals.

- **Company**  
Indicates the company the non-crew person is working for.  
This field is only relevant for externals.
- **Embarkation**  
Indicates the embarkation date of the assignment.
- **Disembarkation**  
Indicates the disembarkation date of the assignment.
- **Assignment status**  
Indicates the assignment status of the seafarer or non-crew member.



### TIP

You can change the assignment status of a person in the list directly.

The following options can apply:

- **On Board**
- **Shore Leave**
- **Working Alongside**

The total number of persons currently on board, on shore leave, and working alongside is displayed below the table.

The following general features are available on this subtab:

- Filter the list for a specific person by entering their name using the filter (☰).
- Filter the list for a specific status by choosing one of the options from the drop-down list:
  - **On Board**
  - **Shore Leave**
  - **Working Alongside**
- Filter the list for a person type by choosing one of the options from the drop-down list:
  - **All**
  - **Crew**
  - **Non-Crew**
- Filter the list of non-crew member categories by choosing one of the options from the drop-down list.



### NOTE

Office users can define further categories under **CFM Crewing > Settings > Miscellaneous > External Categories**.

- Export the list of persons on board to an MS Excel file.



**NOTE**

This export only returns the position of non-crew person instead of their category as well.

**5.2.4. Non-Crew**

The **Non-Crew** subtab lists all persons that are on board the vessel, but don't belong to the crew. These persons can include passengers or technicians, for example. You can also add new non-crew members, manage their sign-on and sign-off dates. In addition, you can import a list of non-crew members and export the list of non-crew members to an MS Excel spreadsheet.

Name	Category	Company	Position	Embarkation	Disembarkation	Assignment Status	Current Status
[Profile Icon]	Charterer		Charterer	01/02/2021 00:00	01/06/2021 00:00	Planned	Planned
[Profile Icon]	Passenger		Passenger	01/02/2021 00:00	01/05/2021 00:00	Planned	Planned



**NOTE**

If a non-crew member was created on a specific vessel, the non-crew member is then synchronized to the entire fleet. The non-crew member is not directly visible in the CSM of the other vessels, but when creating a new non-crew member the system suggests the existing non-crew member as a possible fit for the assignment.

Open the non-crew member's profile > General > General. Select the checkbox **Sync Non-Crew Within Fleet** to enable the transfer of data or deselect it to prevent the transfer of data. This allows you to comply with GDPR.

The following information is displayed on each non-crew member:



- **Picture**  
Displays a picture of the respective non-crew person.
- **Name**  
Indicates the first and last name of the non-crew person.
- **Category**  
Indicates the type of non-crew member the person is. Either **Charterer** or **Passenger** can be applied.



### NOTE

Office users can define further categories under [CFM Crewing](#) > [Settings](#) > [Miscellaneous](#) > [External Categories](#).

- **Company**  
Indicates the company the non-crew person is working for.
- **Position**  
Indicates the position of the non-crew person on board the vessel.
- **Embarkation date**  
Indicates the embarkation date and time of the non-crew person.
- **Disembarkation date**  
Indicates the disembarkation date and time of the non-crew person.
- **Assignment status**  
Indicates the assignment status of the non-crew person.  
The status can differ from the current status.
- **Current status**  
Indicates the current status of the non-crew person, meaning whether they are on board the vessel or on shore.



### TIP

You can change the assignment status of a person in the list directly.

If their embarkation date is in the future and they haven't been signed on, yet, the status remains as **Planned**.

The following general features are available on this subtab:

- **Filter the list for a specific non-crew person** by entering their name in the search bar on top of the table.
- **Manage non-crew persons**  
You can add, edit, and delete non-crew persons from this table.
- **Sign-on and sign-off non-crew persons** for the current assignment

- Export a list of non-crew persons to an MS Excel spreadsheet including the information that you specified
- Import a list of non-crew persons to CSM Crewing
- Export an import template which you can then fill out with new non-crew persons on your local computer and upload to CSM Crewing again.  
Some values in the MS Excel spreadsheet have been filled with values for you to select from and thus, making the process more efficient.

Once you choose a person from the table, a sidebar opens displaying details on the person's assignment. The sidebar allows you to manage familiarization dates of the non-crew persons directly from the subtab without the need to navigate.


To view the details on the non-crew person, choose **Show details** and a dialog window opens that displays the general information on the non-crew person.

### See Also

- [Add Non-Crew Persons \[90\]](#)
- [Sign Non-Crew On \[92\]](#)
- [Export Crew Lists \[80\]](#)
- [Confirm Familiarization of Seafarers \[15\]](#)

### 5.2.4.1. Add Non-Crew Persons

To add a non-crew person, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Open the **Crew List** tab.
4. Navigate to the **Non-Crew** subtab.
5. Choose **Add** and specify the following information:
  - **First Name**  
Enter the first name of the non-crew person.
  - **Last Name**  
Enter the last name of the non-crew person.
  - **Embarkation Port**  
Specify the port at which the non-crew person embarks the vessel.  
By default, **TBA (Unknown)** is set by the system. If you're using CFM Schedules and have maintained a schedule for the selected vessel, you can choose the  position icon and select the relevant port from the planned schedule. Otherwise, select a port from the drop-down list.
  - **Embarkation Date**  
Specify the embarkation date and time of the non-crew person.
  - **Date of Birth**

Enter the date of birth of the non-crew person.

- **Place of Birth**

Enter the place of birth of the non-crew person.

- **Disembarkation Port**

Specify the port at which the non-crew person disembarks the vessel.

- **Disembarkation Date (Estimated)**

Specify the estimated disembarkation date and time of the non-crew person.

- **Nationality**

Select the nationality of the non-crew person from the drop-down list.

- **Sex**

Select the sex of the non-crew person from the drop-down list.

- **Cabin Number**

Enter the cabin number to which the non-crew person is assigned during his stay on the vessel.



### NOTE

You can only enter the cabin number if you are not using CSM Accommodations. Otherwise, this field is read-only.

- **Position**

Enter the position that the non-crew person has in his company. This can be service technician, for example.

- **Height [cm]**

Specify the height [cm] of the non-crew person.

- **Weight [kg]**

Specify the weight [kg] of the non-crew person.

- **Category**

Categories are used to identify a non-crew person further, whether they belong to a group of service technicians or pilots.

Select the applicable category for the non-crew person from the drop-down list.

- **Overall Size**

Specify the overall size of the non-crew person.

- **Shoe Size**

Specify the shoe size of the non-crew person.

- **Company**

Enter the name of the company for which the non-crew person works.

- **Sync Non-Crew Within Fleet**

Select this checkbox to synchronize the specified information of the non-crew person to your fleet. Deselecting this checkbox will not transfer the information and thus allows you to comply with GDPR requirements.

6. Choose **Save** to create the data set for the non-crew person.



### NOTE

You can access the detailed information of a non-crew person with a double click on their entry, and make edits to information, such as travel documents, work shifts and much more.

### Next Steps

After you have created a non-crew person, you need to sign them on to the vessel as a next step.

This is possible from the **Non-Crew** subtab directly, by using the sign-on function. Or you use the **Crew List** subtab and perform a crew change over for the non-crew person.

For more information, see [Perform Crew Changes \[77\]](#).

### 5.2.4.2. Sign Non-Crew On

To sign on non-crew persons to a vessel, proceed as follows.


1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Open the **Crew List** tab.
4. Navigate to the **Non-Crew** subtab.
5. Select the non-crew person and choose **Sign On**.
6. Specify the following information in the dialog window:



### TIP

You can also select several planned non-crew persons from the dialog window and specify the same embarkation date, port and work shift at once.

## CSM Crewing

 Mass Sign-on



Embarkation Date \*

Embarkation Port \*

Non-Crew Filter

Initial Work Shift

Non-Crew Uncheck All

Name	Position	Company	Embarkation Date	Disembarkation Date	
	Charterer		01/02/2021 00:00	01/06/2021 00:00	<input type="checkbox"/>
	Passenger		01/02/2021 00:00	01/05/2021 00:00	<input type="checkbox"/>

- **Embarkation Date**

Enter embarkation date and time for the non-crew persons signing on the vessel.

- **Embarkation Port**

Enter the port at which the non-crew persons are embarking the vessel.



### TIP

Start typing a port into the field and the system provides you with a list of available ports for you to choose from.

- **Initial Work Shift** (optional)

Select the initial work shift for the non-crew persons from the drop-down list.

By default, no work shift is selected.



### NOTE

Work shifts can be managed via CFM Miscellaneous > **General** > **Types** > **Shift Types**.

7. Set the checkboxes next to the non-crew persons that you want to sign on at the same embarkation date and port.



**TIP**

If you work with a long list of non-crew persons, you can use the **Non-Crew Filter** to narrow down your list by entering the name of a person.

8. Choose **Save** to sign on the selected non-crew person to the vessel.

**Result**

The non-crew persons are now also included in the **Crew List**, the **Persons on board**, and the **Non-Crew** list.

**5.2.4.3. Sign Non-Crew Off**

To sign off non-crew persons from a vessel, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Open the **Crew List** tab.
4. Navigate to the **Non-Crew** subtab.
5. Choose **Sign Off** and specify the following information in the dialog window:



**TIP**

You can also select several planned non-crew persons from the dialog window and specify the same disembarkation date and port at once.

✕
Mass Sign-off

Disembarkation Date \*

Disembarkation Port \*

Non-Crew Filter

Non-Crew	Name	Position	Company	Embarkation Date	Disembarkation Date	
	[Redacted]	Charterer	[Redacted]	01/02/2021 12:00	01/06/2021 00:00	<input type="checkbox"/>
	[Redacted]	Passenger	[Redacted]	01/02/2021 12:00	01/05/2021 00:00	<input type="checkbox"/>

Check All

**Save**

- **Disembarkation Date**  
Enter the disembarkation date and time for the non-crew persons signing off the vessel.
- **Disembarkation Port**  
Enter the disembarkation port at which the non-crew persons are disembarking the vessel.



**TIP**

Start typing a port into the field and the system provides you with a list of available ports for you to choose from.

6. Set the checkboxes next to the non-crew persons that you want to sign off at the same disembarkation date and port.



**TIP**

If you work with a long list of non-crew persons, you can use the **Non-Crew Filter** to narrow down your list by entering the name of a person.

7. Choose **Save** to sign off the selected non-crew persons from the vessel.

### 5.2.4.4. Non-Crew - Detail View

The detail view of a non-crew member provides an overview of various kind of information. The data that is displayed applies to the current assignment of the non-crew member. Once a non-crew member has disembarked the vessel, the data is still available for a period of 7 days before it is removed due to GDPR reasons.

It is divided into the following tabs:

- **General**

The General card provides a basic overview of the non-crew member, including general information such as date and place of birth, nationality and so on.

- **Travel Documents**

The Travel Documents card lists all passports, and visas that are relevant for the non-crew member. Further, you can add and manage new travel documents for non-crew members.

**NOTE**

The color indicator next to the tab indicates the worst status of at least one entry in the available lists.

- **Certificates**

The Certificates tab lists all medical certificates and vaccinations of a non-crew member. Further, you can add and manage new certificates for non-crew members.

**NOTE**

The color indicator next to the tab indicates the worst status of at least one entry in the available lists.

- **Work Shifts**

The Work Shifts tab displays all shifts the non-crew member was assigned to. Further, you can add and manage work shifts on this tab.

- **Past Assignments**

The Past Assignments tab lists all assignments of the non-crew person that took place within the current fleet.

### General

On the General tab, you get a basic overview of the non-crew person, including general information, such as date and place of birth, nationality, and so on.

Additional properties are also displayed as well as assignment-related information.

**NOTE**

Information concerning additional properties is only displayed and synchronized for non-crew persons, if this setting has been applied under [CFM Crewing > Settings > Miscellaneous > Seafarers Additional Property Keys](#).

The tab is divided into three cards:

- **General**



The General card displays generic information on the non-crew person. This includes nationality, height and weight, birthday, as well as cabin number and familiarization dates. Familiarization dates are set by the captain of the vessel.

- **Flights**

The Flights card allows you to add a sign-on and a sign-off ticket for the current assignment as an attachment. Additionally, you can export the flight ticket details to a PDF file by choosing **Export Ticket Details**.

- **Assignment Details**

The assignment card displays generic information on the current assignment of the non-crew person, such as embarkation date or embarkation port.

- **Assignment Documents**

The **Assignments Documents** card displays document types for which the synchronization to CSM was enabled. Thus, non-crew members onboard the vessel can be granted access to certain documents, such as contracts.



### NOTE

Enable the synchronization of documents to CSM via CFM Crewing > **Settings** > **Documents** > **Assignment Documents**.

- **Additional Properties**

The Additional Properties card displays additional properties and synchronizes information with your office users only, if the setting was defined.



### NOTE

You can edit this information only for non-crew persons, whereas seafarer's additional properties are read-only.

# CSM Crewing

Non-Crew

Dashboard Crew List Payroll Meals And Lodgings

General Travel Documents Certificates Work Shifts Past Assignments

General Seafarer ID #1266 Edit

Non-Crew (de)x  
External Employee

Nationality: German Height / Weight: 183.00 cm / 83.00 kg  
Birthday / Place of Birth: 12/16/2021 / Halle Overall Size: 42  
Shoe Size: 42 Videtel ID: Not entered  
Nearest Airport: no nearest airport Cabin Number: Not entered  
Familiarization Date: 11/24/2022 Familiarization Date for External: Not familiarized yet  
Domain Login: Address: Not entered

Flights Export Ticket Details

Embarkation Flight Ticket Add

Disembarkation Flight Ticket Add

Assignment Details

Embarkation Date: 4/19/2023 Disembarkation Date: 8/10/2023  
Embarkation Port: TBA (Unknown) Disembarkation Port: TBA (Unknown)

Assignment Documents

Additional Properties

Name	Value
Group (2)	
Additional Remarks	
Latest Sign-Off Date	1/1/0001

Familiarize Export Meals & Lodgings Save

## Travel Documents

The Travel Documents tab lists all passports, and visas that are relevant for the non-crew person.

The travel documents are sorted according to their type: Passport, visa and so on.



### NOTE

You can also add, edit or delete travel documents, unlike for a seafarer.

The following information on each document is displayed:

- **Number**  
Displays the identification number of the travel document.
- **Issue Place**  
Indicates the location in which the document was issued.
- **Country**  
Indicates the country for which the document is valid, such as an Australian Visa.
- **Issue Date**  
Displays the date on which the document was issued.
- **Expiry Date**  
Displays the date on which the document expires.

The status of the travel documents is indicated with a color code next to every entry in the table:

- **Green**

The travel document is available and valid.

- **Orange**

The travel document is available, but due to expire soon.

- **Red**


The travel document is available but has already expired.

- **Purple**

The travel document is missing.

### Add Passport


To add a non-crew person's passport, proceed as follows.

1. Open your CSM client.
2. Open the **Crewing** tile
3. Access the detailed view of a non-crew person and open the subtab **Travel Documents**
4. Select **Add Passport** and provide the following information:
  - **Nationality**  
Enter the nationality of the non-crew person.
  - **Number**  
Enter the passport's number.
  - **Issue Date**  
Enter the date when the passport was issued.
  - **Expiry Date**  
Enter the passport's expiry date.
  - **Issue Place**  
Enter the location where the passport was issued.
  - **Never Expires**  
Select this checkbox to indicate that the passport does not expire.  
The field expiry date is then removed.
  - **Remark**  
Enter any additional remarks that are relevant to the non-crew person's passport.
  - **Document**  
Select the  plus icon to attach a document.
5. Select **Save** to apply your settings.

### Add Seafarer Book

To add a non-crew person's seafarer book, proceed as follows

1. Open your CSM client.
2. Open the **Crewing** tile.
3. Access the detailed view of a non-crew person and open the subtab **Travel Documents**


4. Select **Add Seafarer Book** and provide the requested information:
  - **Flag State**  
Enter the flag state for which the seafarer book is valid.
  - **Number**  
Enter the seafarer's book number.
  - **Issue Date**  
Enter the date when the seafarer book was issued.
  - **Expiry Date**  
Enter the seafarer's book expiry date.
  - **Issue Place**  
Enter the location where the seafarer book was issued.
  - **Never Expires**  
Select this checkbox to indicate that the seafarer book does not expire.  
The field expiry date is then removed.
  - **Remark**  
Enter any additional remarks relevant to the seafarer book.
  - **Document**  
Select the  plus icon to attach a document.
5. Select **Save** to apply your settings.

### Add Visa

To add a non-crew person's Visa, proceed as follows.

1. Open your CSM client.
2. Open the **Crewing** tile
3. Access the detailed view of a non-crew person and open the subtab **Travel Documents**.
4. Select **Add Visa** and provide the requested information:
  - **Visa Type**  
Select the non-crew person's type of Visa from the drop-down menu.
  - **Number**  
Enter the document's number.
  - **Issue Date**  
Enter the date when the Visa was issued.
  - **Expiry Date**  
Enter the Visa's expiry date.
  - **Never Expires**  
Select this checkbox to indicate that the Visa does not expire.  
The field expiry date is then removed.
  - **Remark**  
Enter any additional remarks relevant to the Visa.

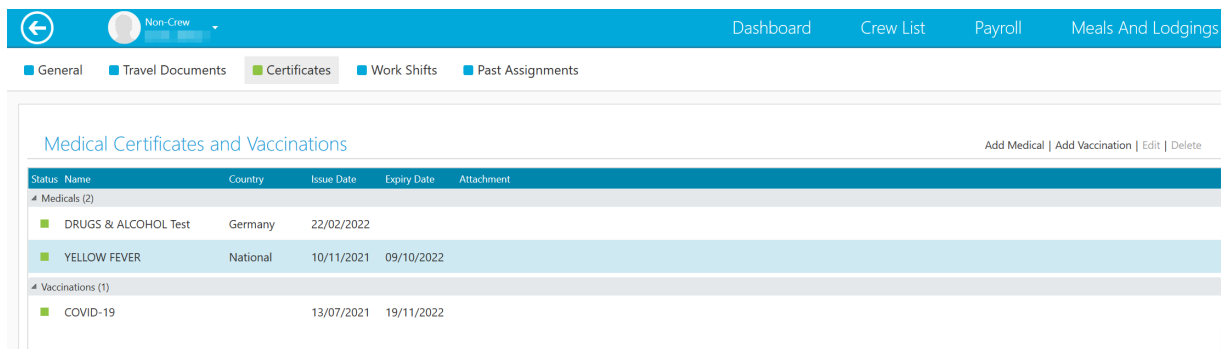
- **Document**

Select the  plus icon to attach a document.

5. Select **Save** to apply your settings.

## Certificates


The Certificates tab lists all medical certificates and vaccinations off a non-crew member. You are able to add certificates for non-crew member, unlike for a seafarer.



Status	Name	Country	Issue Date	Expiry Date	Attachment
Medicals (2)					
	DRUGS & ALCOHOL Test	Germany	22/02/2022		
	YELLOW FEVER	National	10/11/2021	09/10/2022	
Vaccinations (1)					
	COVID-19		13/07/2021	19/11/2022	

## Add Medical Certificates

To add medical certificates to a non-crew person, proceed as follows.


1. Open your CSM client.
2. Open the **Crewing** tile
3. Access the detailed view of a non-crew person and open the subtab **Certificates**
4. Select **Add Medical** and provide the requested information:
  - **Medical Type**  
Select the applicable medical type from the drop-down menu.
  - **Flag State**  
Enter the flag state that issued this medical certificate.
  - **Issue Date**  
Select the date, when this medical certificate was issued.
  - **Expiry Date**  
Select the date, when this medical certificate expires.
  - **Never Expires**  
Select this checkbox, if this medical certificate never expires and thus, disables the **Expiry Date**.
  - **Remark**  
Enter any additional remarks to this medical certificate.
  - **Document**  
Select the  plus icon to add a document.
5. Select **Save** to apply your settings.

**NOTE**

In order to edit or delete a medical certificate, simply select your desired entry and either choose **Edit** or **Delete**.

**Add Vaccinations**

To add a vaccination to a non-crew person, proceed as follows.

1. Open your CSM client.
2. Open the **Crewing** tile
3. Access the detailed view of a non-crew person and open the subtab **Certificates**
4. Select **Add Vaccination** and provide the requested information:
  - **Vaccination Type**  
Select the vaccination type from the drop-down menu.
  - **Issue Date**  
Select the date, when the vaccination was issued.
  - **Expiry Date**  
Select the date, when the vaccination expires.
  - **Never Expires**  
Select this checkbox, if this vaccination never expires and thus disables the **Expiry Date**.
  - **Remark**  
Provide any additional remarks to the vaccination.
  - **Document**  
Select the  plus icon to add a document.
5. Select **Save** to apply your settings.

**NOTE**

In order to edit or delete a vaccination, simply select your desired entry and choose either **Edit** or **Delete**.

**Work Shifts**

The Work Shifts tab of a non-crew person displays all shifts the non-crew person was assigned to. This tab also allows you to add work shifts.

Rank	Shift Type	Valid From	Valid To
Non-Crew	Off Duty	06/03/2022	08/03/2022
Non-Crew	Night Time (18-06)	28/02/2022	05/03/2022
Non-Crew	Overtime	27/02/2022	27/02/2022
Non-Crew	Day Time (06-18)	21/02/2022	26/02/2022

## Add Work Shift

To add works shifts for a non-crew person, proceed as follows.

1. Login to the CSM client.
2. Open the **Crewing** tile
3. Access the detailed view of a non-crew person and open the subtab **Work Shifts**
4. Select Add and provide the requested information:
  - **Work Shift Type**  
Select the applicable work shift type from the drop-down menu.
  - **Valid From**  
Select the date from when on this work shift is valid.
  - **Valid To**  
Select the date until when this work shift is valid.
5. Select **Save** to apply your settings.



### NOTE

In order to edit or delete a work shift, simply select your desired entry and either choose **Edit** or **Delete**.

## Past Assignments

The Past Assignments tab lists all assignments of the non-crew person that took place within this fleet for documentary purposes.



### NOTE

The relevant permissions must be assigned to your user account to view this tab.

The following information is displayed on each assignment:

- **Vessel**

Indicates the name of the vessel on which the assignment took place.

- **Rank**

Indicates the rank the non-crew person held during the assignment.

- **Embarkation Date**

Indicates the embarkation date of the assignment.

- **Disembarkation Date**

Indicates the disembarkation date of the assignment.

## 5.3. Payroll

The **Payroll** tab provides an overview of the payroll for the current and previous month of all seafarers that are on board the vessel.

It is divided into the following subtabs:

- **Home Allotments**

The **Home Allotments** subtab lists all data that was synchronized from CFM Crewing for the current and previous month of all seafarers that are on board the vessel. This is the default value that you specified for home allotments in CFM Crewing.

The Captain of the vessel has to review and confirm the allotments, accordingly, so that they are considered in the respective payroll of the seafarers. If necessary, the home allotment amounts and the corresponding accounts can also be adapted. You cannot add new bank accounts or edit bank accounts using CSM Crewing, though.

- **Monthly Wages**

The **Monthly Wages** subtab lists all monthly wages for the current and following months of all seafarers that are on board the vessel.

The monthly wages include all calculated earnings and deductions based on the wages assigned to the seafarers.

The Captain of the vessel has to review and confirm the monthly wages, accordingly.

- **Final Wages**

The **Final Wages** subtab lists all final wages for the current month of all seafarers that are disembarking the vessel during this month.

The final wages include all calculated earnings and deductions based on the wages assigned to the seafarers.

The Captain of the vessel has to review and confirm the final wages, accordingly.



### TIP

It is possible to configure which information should be displayed on the **Payroll** tab. If you want to hide certain areas for data protection reasons, contact the support team.

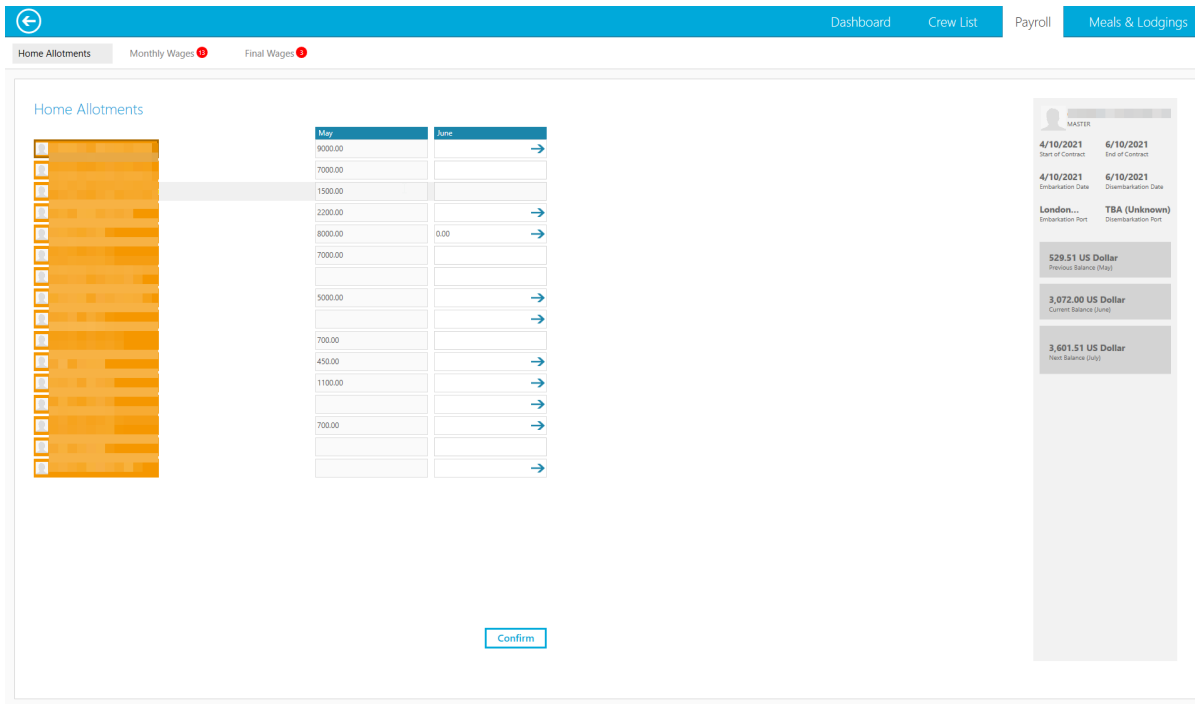
In addition, a global setting is available to enable creating, respectively editing home allotments, special allotments, as well as monthly wages and final wages for seafarers without a bank account in the system. Contact our Helpdesk to activate this setting for you.



### 5.3.1. Home Allotments

The **Home Allotments** subtab lists all data that was synchronized from CFM Crewing for the current and previous month of all seafarers that are on board the vessel. This is the default value that you specified for home allotments in CFM Crewing.

The Captain of the vessel has to review and confirm the allotments, accordingly, so that they are considered in the respective payroll of the seafarers. If necessary, the home allotment amounts and the corresponding accounts can also be adapted. You cannot add new bank accounts or edit bank accounts using CSM Crewing, though.



The following information is displayed on this subtab:

- List of seafarers
  - The subtab lists the seafarers that are on board the vessel during the current and previous month with their picture and first and last name.
  - The color codes of the entries indicate the following:
    - **Green** - No home allotment exists for the seafarer in the current month or the home allotment has been finalized already.
    - **Blue** - Home allotments exist in the current month and the expected pay day lies in the future (including the current date).
    - **Orange** - Home allotments exist in the current month and the expected pay day lies in the past.
    - **Red** - Home allotments of past months exist that have not been confirmed yet and are thus overdue.
- Current and previous month
- Sidebar
  - A sidebar displays generic information on the ongoing assignment of the respective seafarer. The following details are displayed:

- Picture
- First and last name
- Rank
- Start and end of contract date
- Embarkation and disembarkation date
- Embarkation and disembarkation port
- Balance of the previous month  
The balance of the previous month is only displayed, if **Forward Balancing** was defined in the seafarer's payroll settings in CFM Crewing.
- Current balance
- Balance of the next month  
The balance of the next month is only displayed, if **Forward Balancing** was defined in the seafarer's payroll settings in CFM Crewing.

### 5.3.1.1. Edit Home Allotments

To edit home allotment amounts, proceed as follows.



#### NOTE

You can only edit the home allotment amounts as long as they haven't been confirmed, yet.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Open the **Payroll** tab.
4. Navigate to the **Home Allotments** subtab.
5. Choose the **Arrow** icon (→).  
Alternatively, you can also directly enter the home allotment amount in field for the respective month, if only one bank account was defined for the seafarer.
6. In the flyout window, enter the home allotment amounts for the different bank accounts.
7. Choose **Close**.  
The system automatically saves the entries you have made and displays the sum in the field for the current month.

#### Next Steps

For the home allotment amounts to take effect in the payrolls of the respective seafarers, they must be confirmed, first.

For more information, see [Confirm Home Allotments \[107\]](#).


### 5.3.1.2. Confirm Home Allotments

For home allotments to be considered in the payroll of the seafarers they must be confirmed by the Captain of the vessel, first.



#### NOTE

Once home allotments are confirmed, they can no longer be edited using CSM Crewing. This also applies to home allotments finalized by office users.


Select the eye  icon next to confirmed home allotments to display details of the selected bank. This serves as proof to seafarers that their allotment was sent to the correct bank account.

To do so, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Open the **Payroll** tab.
4. Navigate to the **Home Allotments** subtab.
5. Choose **Confirm** at the bottom of the subtab.
6. Confirm the warning message.

#### Result

All home allotments that were specified and are equal to or greater than 0 are confirmed. These home allotments are then considered in the payroll and can no longer be edited.

The corresponding home allotment list in CFM Crewing is updated accordingly: A **transparent** vessel icon () is displayed next to every home allotment that was already confirmed on board the vessel. Once all home allotments for all seafarers on board the vessel during the current assignment were confirmed, the vessel icon is displayed in **white**.

Only once all home allotments have been confirmed by the Captain of the vessel should colleagues in the office using CFM Crewing start processing them.

### 5.3.2. Monthly Wages

The **Monthly Wages** subtab lists all monthly wages for the current and following months of all seafarers that are on board the vessel.

The monthly wages include all calculated earnings and deductions based on the wages assigned to the seafarers.

The Captain of the vessel has to review and confirm the monthly wages, accordingly.

The following information is displayed on this subtab:

- List of seafarers  
The subtab lists the seafarers that are on board the vessel during the current and following months with their picture and first and last name.
- Current and following months  
By default, monthly wages for the current and following months that belong to the current assignment are displayed.  
You can, however, display past monthly wages, as well. Choose the date picker icon (📅) in the **Payrolls since** field and choose a different month.

**! IMPORTANT**  
But only the monthly wages of the seafarers are displayed that were on board the vessel in the past and are still on board the vessel during the current month. For data protection purposes, no data of seafarers that have already disembarked the vessel are displayed.

- Earnings and deductions  
For each month, earnings and deductions based on the seafarers wages are displayed. The earnings and deductions are grouped according to the defined paycodes:
  - **Pro-Rated**  
Displays paycodes that were defined as monthly amounts and are used in the corresponding wage scales. The amounts are automatically calculated by the system.

- **Absolute**

Displays paycodes that were declared as monthly, absolute amounts and are used in the corresponding wage scales. The amounts are fixed values for each month and assignment.

- **Daily Rates**

Displays paycodes that were declared as monthly amounts and are used in the corresponding wage scales. The amounts are defined as daily rates in the paycode matrix and are automatically calculated by the system.

- **Additional Earnings / Additional Deductions**

Displays paycodes that were not declared as monthly amounts. The amounts are displayed for each payroll, by default, if they were defined in the settings. If required, you can add additional earnings and deductions here manually.

- **Sidebar**

A sidebar displays generic information on the ongoing assignment of the respective seafarer. The following details are displayed:

- Picture
- First and last name
- Rank
- Start and end of contract date
- Embarkation and disembarkation date
- Embarkation and disembarkation port
- Balance of the previous month
- Current balance
- Balance of the next month

The following statuses can apply:

- **Overdue (Red)**

- **Month**  
Monthly wage hasn't been confirmed, yet and is older than the current month.
- **Seafarer**  
Any final wage in the past hasn't been confirmed, yet and is still open.

- **Confirmed (Green)**

Once the Captain of the vessel has confirmed the monthly wages, the corresponding tabs are displayed in **green**. If all monthly wages are confirmed, the entry of the seafarer on the left is also displayed in **green**.

- **No action needed (Blue)**

The monthly wage is relevant for the current month or some time in the future and no action is required, yet.

### 5.3.2.1. Add Additional Earnings / Deductions

To add additional earnings or deductions to the monthly wage or final wage of a seafarer, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Open the **Payroll** tab.
4. Navigate to the **Monthly Wages** or **Final Wages** subtab.
5. In the **Earnings** or **Deductions** area, choose the plus icon (+) and choose the type of earning or deduction from the flyout window.  
All additional earnings or deductions that were defined in CFM Crewing can be added. For example, the types listed below which are standard types:

Earnings			Deductions		
^ Pro-rated 1,626,00			^ Monthly absolute 0,00		
▼ Basic wage	30,00 days	845,00	^ Pro-rated 0,00		
▼ Sub allowance	30,00 days	152,00	^ Additional ded. 0,00 +		
▼ Guaranteed overtime	30,00 days	629,00	▼ Allotment	Bonded store	
^ Monthly absolute 0,00			▼ Cash advance	Cash advance	0,00
^ Additional earn 0,00 +			▼ Bonded store	Com. Cards	0,00
▼ Overtime	Other	0,00	▼ Other	Other	0,00
▼ Travel Expense	Other	0,00	▼ Paid out cash	Other	0,00
▼ Other	Seniority bonus	0,00	▼ Com. Cards	Paid out cash	0,00
	Travel Expenses	0,00	▼ Taxes	Special Allotment	0,00
				Taxes	0,00

- **Overtime**

This is a standard additional earning type that records the total overtime and multiplies the overtime with a rate defined in the wage scales in CFM Crewing.

- **Travel Expenses**



**NOTE**

If travel expenses were already added for the seafarer in his seafarer record, you cannot enter an additional earning or deduction of type **Travel Expenses**. The system transfers the respective data from the seafarer record to the payroll.

For more information, see [Travel Expenses \[51\]](#).

- **Bonded Store**

**NOTE**

If you're using CFM Cashbox & Bonded Store, you cannot enter an additional earning or deduction of type **Bonded Store** or **Cash Advance**.

In case, you want to add manual entries for a specific vessel, nevertheless, you need to specify separate payroll earnings or deductions in CFM Crewing.

- **Cash Advance**

- **Special Allotment**

Special allotments are different from the rest. For details on how to add special allotments, see [Add Special Allotments \[111\]](#).

6. A new row is added to the respective type listed under **Additional earnings** or **Additional deductions**.

**NOTE**

If several earnings or deductions of the same type are added, the system then groups them into one row on the screen. The total sum of this type is displayed in the header.

To remove a row, choose the trash icon (🗑️).

7. Enter the relevant amount for the additional earning or deduction in the **Amount** field.
8. Optionally, you can enter a remark explaining the earning or deduction further.
9. Choose **Save** to save your entries.

### 5.3.2.2. Add Special Allotments

To add special allotments to monthly or final wages of a seafarer, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Navigate to the **Monthly Wages** or **Final Wages** subtab.
4. In the **Deductions** area, choose the plus icon (+) and then choose **Special Allotment** from the flyout window.
5. In the dialog window, you can specify the special allotment amounts.  
If the seafarer has more than one bank account, you can split the amounts into **Allotment #1** and **Allotment #2**, for example.

**NOTE**

You are not provided with bank accounts that were archived via CFM Crewing.

6. Choose **Ok** to save your entries.

### Result

A new row is added to the **Special Allotment** type under **Additional deductions**.

^ Additional deductions		400,00	+
^ Special Allotment		400,00	
01.07.2020 - 02.07.2020	Remark	400	↔ (trash icon)



### NOTE

To remove a row, choose the trash icon (🗑).

The single arrow icon (↔) indicates that one special allotment for one bank account was entered.

The splitted arrow icon (↔) indicates that the special allotment was divided between two bank accounts.

### Next Steps

All special allotments are then synchronized to the **Special Allotments** list on the payroll dashboard in CFM Crewing. The colleagues in the office then review, edit and confirm or delete the respective special allotments, accordingly.



### 5.3.2.3. Confirm Monthly Wages

To confirm the monthly wages of seafarers on board the vessel and thus trigger the validation and finalization of payrolls in the office, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Open the **Payroll** tab.
4. Navigate to the **Monthly Wages** subtab.
5. Choose the tab of the month for which you want to confirm the monthly wages.
6. Choose **Confirm** at the bottom of the subtab.
7. Confirm the warning message.

#### Result

The monthly wages for the selected month are confirmed and the corresponding tab is displayed in green.

You can no longer add additional earnings or deductions to the monthly wage.



#### NOTE

To initiate changes to an already confirmed monthly wage, two processes are in place:

- Provide office users with access to CFM Crewing the list of necessary changes and request them to apply them.
- Contact office users with access to CFM Crewing. Request them to select **Reopen Vessel Payroll** and synchronize the reopened payroll back to the vessel. You can then apply the necessary changes yourself.

Wages' positions can be expanded to view their corresponding sub-positions, regardless of the confirmation status. This serves as proof to seafarers to trace back each respective position.

The corresponding monthly wages list in CFM Crewing is updated accordingly: A **transparent** vessel icon (🚢) is displayed next to every monthly wage that was already confirmed on board the vessel. Once all monthly wages for all seafarers on board the vessel during the current assignment were confirmed, the vessel icon is displayed in **white**.

#### Next Steps

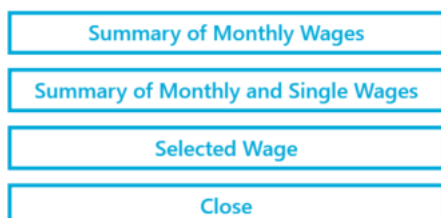
The monthly wages now need to be finalized by colleagues in the office using CFM Crewing.

### 5.3.2.4. Export Monthly and Final Wages

You can export different versions of the monthly and final wages to an MS Excel spreadsheet.

To do so, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Navigate to the **Monthly Wages** or **Final Wages** subtab.
4. Choose **Export** and choose one of the following formats:



- **Summary of Monthly Wages**  
Exports an overview of the monthly and final wages of the current month for all seafarers on board the vessel.
- **Summary of Monthly and Single Wages**  
Exports an overview of the monthly and single wages of the current month for all seafarers on board the vessel and additionally, the payslips for each seafarer on a separate sheet.
- **Selected Wage**  
Exports the monthly or final payslip for the current month of the selected seafarer.

### 5.3.3. Final Wages

The **Final Wages** subtab lists all final wages for the current month of all seafarers that are disembarking the vessel during this month.

The final wages include all calculated earnings and deductions based on the wages assigned to the seafarers.

The Captain of the vessel has to review and confirm the final wages, accordingly.

The screenshot shows the 'Final wages' subtab. At the top, there is a navigation bar with 'Dashboard', 'Crew list', 'Payroll', and 'Meals & Lodgings'. Below this, there are tabs for 'Home allotments', 'Monthly wages', and 'Final wages'. The main content area is titled 'Final wages' and displays a table of earnings and deductions for a specific month (September 2020). The earnings table shows a total of 2,667.21 US Dollar, and the deductions table shows a total of 0.00 US Dollar. A sidebar on the right contains information about the seafarer, including their name (ZOOK), start and end dates, and current balance.

The following information is displayed on this subtab:

- List of seafarers

The subtab lists the seafarers that are signing off the vessel during the current month and displays their picture and first and last name.

- Current month

By default, final wages for the current month are displayed.

You can, however, display past final wages, as well. Choose the date picker icon (📅) in the **Payrolls since** field and choose a different month.



### IMPORTANT

But only the final wages of the seafarers are displayed that were on board the vessel in the past and are still on board the vessel during the current month. For data protection purposes, no data of seafarers that have already disembarked the vessel are displayed.

Wages' positions can be expanded to view their corresponding sub-positions, regardless of the confirmation status. This serves as proof to seafarers to trace back each respective position.

- Sidebar

A sidebar displays generic information on the ongoing assignment of the respective seafarer. The following details are displayed:

- Picture
- First and last name
- Rank
- Start and end of contract date
- Embarkation and disembarkation date
- Embarkation and disembarkation port
- Balance of the previous month
- Current balance
- Balance of the next month

The following features are available from this subtab:

- **Add additional earnings or deductions**  
You can add additional earnings or deductions to the final wage of a seafarer. For more information, see [Add Additional Earnings / Deductions \[110\]](#).
- **Add special allotments**  
You can add special allotments to the deductions of a seafarer's final wage. For more information, see [Add Special Allotments \[111\]](#).
- **Confirm final wages**  
To trigger the payment process of the final wages for the seafarers that are signing off during the current month, the Captain of the vessel needs to confirm the final wages, first. For more information, see [Confirm Final Wages](#).
- **Export final wages**  
You can export different formats of monthly and final wages to an MS Excel spreadsheet. For more information, see [Export Monthly and Final Wages \[113\]](#).

The following statuses can apply:

- **Overdue (Red)**
  - **Month**  
Final wage hasn't been confirmed, yet and is older than the current month.
  - **Seafarer**  
Any final wage in the past hasn't been confirmed, yet and is still open.
- **Confirmed (Green)**  
Once the Captain of the vessel has confirmed the final wages, the corresponding tabs are displayed in **green**. If all final wages are confirmed, the entry of the seafarer on the left is also displayed in **green**.
- **No action needed (Blue)**  
The final wage is relevant for the current month or some time in the future and no action is required, yet.

## 5.4. Meals And Lodgings

The **Meals And Lodgings** tab provides an overview of the registered meals for guests on board the vessel.

You can add, edit, and delete single meals from this tab.

Date	Breakfast	Lunch	Dinner	Category	Charterer	Remark
11/30/2022	5	5	5			
11/28/2022	4	2	2			Lunch included 2 glasses of wine.
11/25/2022	4	3	2			2 Passengers felt sick and did not attend dinner.

Total Breakfast: 13      Total Lunch: 10      Total Dinner: 9      Total Overall: 32

Buttons: Finalize, Save

The following information is displayed on this subtab:

- **Date**  
Indicates the date for which the meals were registered.
- **Number of breakfasts**  
Displays the number of breakfasts that were consumed.
- **Number of lunches**  
Displays the number of lunches that were consumed.
- **Number of dinners**  
Displays the number of dinners that were consumed.
- **Category**  
Indicates the category for which the meals were registered.
- **Charterer**  
Indicates from which charterer the guests were sent to the vessel.
- **Remark**  
Displays any additional remark that was left.
- **Total number of breakfasts**  
Displays the total number of breakfasts that were registered during the selected month.
- **Total number of lunches**  
Displays the total number of lunches that were registered during the selected month.

- **Total number of dinners**  
Displays the total number of dinners that were registered during the selected month.
- **Total meals**  
Displays the total number of meals that were registered during the selected month.

You can adjust the information that is displayed on the **Meals & Lodgings** tab.

- Filter the table for the following parameters:
  - **Charterer**  
To filter the table for a specific charterer, choose the filter icon (☰) and select the relevant charterer from the drop-down list.
  - **Category**  
To filter the table for a specific category of externals, choose the filter icon (☰) and select the relevant category from the drop-down list.
- Select the month for which the single meals should be displayed.  
By default, the system displays the data for the current month.  
To change the month, choose the date picker icon (📅) in the **For month:** field and choose a month.

### 5.4.1. Add Meals

To add meals for guests to the system, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Navigate to the **Meals & Lodgings** tab.
4. Choose **Add** above the table.
5. Specify the following values in the row that was added to the table:
  - **Date**  
Specify the date on which the meals were consumed.
  - **Breakfast**  
Enter the number of breakfasts that were consumed into this field.
  - **Lunch**  
Enter the number of lunches that were consumed into this field.
  - **Dinner**  
Enter the number of dinners that were consumed into this field.
  - **Category**  
Categories are used to identify a non-crew person further, whether they belong to a group of service technicians or pilots.  
Select the category to which the meals should be assigned from the drop-down list.



**NOTE**

Categories are defined on database level by our Helpdesk.

- **Charterer**

Select the responsible charterer from the drop-down list.



**NOTE**

This field is only available, if you selected **Charterer** as the respective **Category**.

- **Remark**

Enter any additional remarks into this field.

6. Choose **Save** to save your entries.

**Next Steps**

Once you're done entering all meals for a specific month, **Finalize** your entries to avoid any potential errors.



**NOTE**

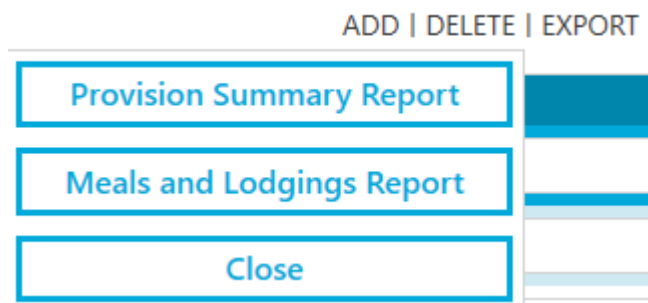
You can always reopen the entries for a specific month by choosing **Reopen** at the bottom of the screen.

**5.4.2. Export Meals & Lodgings Reports**

You can export the meals registered for a specific month to different formats.

To do so, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Navigate to the **Meals & Lodgings** tab.
4. Choose **Export** above the table and select one of the following formats:



## CSM Crewing

- Provision Summary Report**

This export provides a summary of all calculated meals for crew and external persons as well as all registered single meals for day passengers. It can be used as the basis for your budget calculations.

The system calculates the number of meals for crew and external persons in the background based on their embarkation and disembarkation date and time.

The following rules apply:

**Table 1. Calculation of Meals at Embarkation**

Embarkation Time	Breakfast	Lunch	Dinner
Until 8:30 AM	x	x	x
Between 8:30 AM and 12:30 PM	-	x	x
Between 12:30 PM and 06:30 PM	-	-	x
After 06:30 PM	-	-	-

**Table 2. Calculation of Meals at Disembarkation**

Disembarkation Time	Breakfast	Lunch	Dinner
Between 12:00 AM and 07:00 AM	-	-	-
Between 07:00 AM and 11:30 AM	x	-	-
Between 11:30 AM and 05:30 PM	x	x	-
Between 05:30 PM and 12:00 AM	x	x	x

All other days of the assignment are of course calculated with 3 meals a day.

**Example 1. Provision Summary Report for December 2020**

Line 14, 19, and 24 in the example of the MS Excel export below represent the meals that were added manually.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG		
1	<b>Manning: December.2020</b>	IMO Number:	5000225													Master:																			
2																																			
3		Vessel Name:	HS																																
4																																			
5	Status:	Comments:																																	
6																																			
7																																			
8																																			
9																																			
10																																			
11			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Totals	
12	<b>Breakfast</b>																																		
13	Crew & Officers		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
14			5	1	1	5	0	0	0	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
15			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
16																																			
17	<b>Lunch</b>																																		
18	Crew & Officers		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
19			3	1	1	5	0	0	0	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
20			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
21																																			
22	<b>Dinner</b>																																		
23	Crew & Officers		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
24			3	1	1	5	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
25			0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
26																																			
27																																			
28																																			<b>Total Overall:</b>
																																			<b>41</b>

- Meals and Lodgings Report**



This export provides an overview of meals and lodgings that were registered for a specific charterer. You can use this export when you invoice the charterer.

To export this report, choose a charterer from the drop-down list and then choose [Export Meals and Lodging](#).

Lodgings are calculated on the following rules:



### NOTE

Lodgings apply for external employees of category Charter, only.

- **Embarkation**

- Lodging is paid as of the day an external employee embarks the vessel
- Lodging is not paid if embarkation and disembarkation are on the same day

- **Disembarkation**

- Lodging is not paid for the day the external employee disembarks the vessel

### Example 2. Meals and Lodgings Report for Charterer

The [Meals](#) column displays the number of meals that were served for crew and external persons.

## CSM Crewing

The **Single Meals** column displays the number of meals that were registered manually for day passengers.

	A	B	C	D	E
1	<b>Vessel:</b>	5000225 HS		<b>Month:</b>	December 2020
2	<b>Charterer:</b>	American President Lines (Bermuda)			
3					
4	<b>Date</b>	<b>Lodging</b>	<b>Meals</b>	<b>Single Meals</b>	<b>Remarks</b>
5	01.12.2020	0	0	0	
6	02.12.2020	0	0	0	
7	03.12.2020	0	0	0	
8	04.12.2020	0	0	0	
9	05.12.2020	0	0	0	
10	06.12.2020	0	0	0	
11	07.12.2020	0	0	0	
12	08.12.2020	0	0	9	2 passengers felt sick and didn't attend dinner.
13	09.12.2020	0	0	0	
14	10.12.2020	0	0	0	
15	11.12.2020	0	0	0	
16	12.12.2020	0	0	0	
17	13.12.2020	0	0	0	
18	14.12.2020	0	0	0	
19	15.12.2020	0	0	0	
20	16.12.2020	0	0	0	
21	17.12.2020	0	0	0	
22	18.12.2020	0	0	0	
23	19.12.2020	0	0	0	
24	20.12.2020	0	0	0	
25	21.12.2020	0	0	0	
26	22.12.2020	0	0	0	
27	23.12.2020	0	0	0	
28	24.12.2020	0	0	0	
29	25.12.2020	0	0	0	
30	26.12.2020	0	0	0	
31	27.12.2020	0	0	0	
32	28.12.2020	0	0	0	
33	29.12.2020	0	0	0	
34	30.12.2020	0	0	0	
35	31.12.2020	0	0	0	
36	<b>Sum</b>	<b>0</b>	<b>0</b>	<b>9</b>	<b>Total overall: 9</b>
37					
38					
39	<b>Master</b>				<b>Charter Team Leader</b>
40					
41					

### 5.4.3. Export Meals & Lodgings for an Individual Non-Crew Person

You can also export the meals and lodgings for an individual non-crew person.

To do so, proceed as follows.

1. Login to your CSM client.
2. Open the **Crewing** tile.
3. Open the **Crew List** tab.

4. Navigate to the **Non-Crew** subtab.
5. Choose a non-crew person from the list and either choose **Show details** from the sidebar or double-click the entry in the table, directly.
6. On the **General** card, choose **Export Meals & Lodgings**.

**Result**

The meals and lodgings calculated for the entire stay on board the vessel of the selected non-crew person are exported to an MS Excel spreadsheet.

The data is calculated based on the rules described in [Export Meals & Lodgings Reports \[119\]](#).

**Example 1. Meals and Lodgings for Parker, Harry**

The export includes assignment details of the non-crew person, the responsible charterer, as well as the total number of meals and lodgings recorded.

	A	B	C	D	E	F	G
1	<b>Vessel:</b>	5000225 HS					
2							
3							
4							
5	<b>Name of Passenger:</b>	Parker, Harry					
6	<b>Charterer:</b>						
7	<b>Company Name:</b>	Manning Agency					
8					<b>Passenger Signature</b>		
9							
10							
11	<b>Embarkation Date:</b>	25.11.2020	<b>Time:</b>	16:56			
12	<b>Disembarkation Date:</b>	29.11.2020	<b>Time:</b>	18:00			
13	<b>Length of stay (days):</b>	5					
14							
15							
16							
17	<b>Total Number of breakfasts:</b>	4					
18	<b>Total Number of lunches:</b>	4					
19	<b>Total Number of dinners:</b>	5					
20	<b>Total Number of Lodgings:</b>	4					
21							
22							
23							
24	<b>Master:</b>				<b>Masters Signature</b>		
25							

## 6. Revision history

The revision history provides you with a table, containing a summary of applied changes to the user guide based on its corresponding module. The user guide's version stamp is available to you in its file name. The revision history gives you the gist of minor and major changes rather than explaining everything in detail. Refer to the **What's New** section for our daily features, updates, and bug fixes. You can also reach out to our Helpdesk if you come across any uncertainties or questions.

Semantic versioning will be applied and uses a three-part version number (Major.Minor.Patch). Significant changes are indicated by an increased major number; new, less significant adaptations increment the minor number and all other updates increase the patch number.

Version	Changes	Date of Publication	Author
v2.0.0	<ul style="list-style-type: none"> <li>• Enhanced Me-section</li> <li>• New dashboard cards</li> <li>• Extended crew list features</li> </ul>	31.03.2023	Ricardo da Costa Lima
v1.0.0	<ul style="list-style-type: none"> <li>• Initial creation of user guide</li> </ul>	07.12.2020	[Inactive]