nexsure™

TIPS AND FACTS

Issue 3

IN THIS ISSUE

✖ What Policies Get Updated and When with Downloads

What Policies Get Updated and When with Downloads

Type	Description
Renewal Image	If the renewal policy term does not exist, the downloaded policy is sent to the policy summary page. This provides ample time for the agency to complete any outstanding issues on the expiring policy. Once the expiring policy is complete and ready for history, click on the **History** link on the underwriting navigation toolbar and complete the process. If the renewal policy already exists (perhaps added by the agency), the existing policy is automatically moved from policy summary to history and replaced by the newly downloaded version. Policy Mode: Renew Stage: Policy Status: Received
Renewal Quote	When the client already exists, the downloaded policy is sent to the marketing summary page. Policy Mode: Renew Stage: Marketing Status: Quoted
New Policies	When the client already exists but a matching policy is not located, the downloaded policy is sent to the policy summary page. Should the policy already exist, the existing policy is automatically moved from policy summary to history and replaced by the newly downloaded version. Policy Mode: New Stage: Policy Status: Received

nexsure™

TIPS AND FACTS

Endorsement	When the client already exists and a matching policy is located, the downloaded policy endorsement is sent to the policy summary page. The existing policy is automatically moved from policy summary to history. Policy Mode: New, if the policy does not already exist. If the policy does exist, the mode will remain as indicated in the previous version. Stage: Policy Status: Received
Cancellation (Current or Prior cancellation date)	When the client already exists and a matching policy is located, the cancellation request form is added. The downloaded policy cancellation is then sent to the policy history summary page. Policy Mode: New, if the policy does not already exist. If the policy does exist, the mode will remain as indicated in the previous version. Stage: Cancellation Status: Cancellation
Cancellation (Future cancellation date)	When the client already exists and a matching policy is located, the cancellation request form is added and automatically moves the previous version to history. Policy Mode: New, if the policy does not already exist. If the policy does exist, the mode will remain as indicated in the previous version. Stage: Pending Cancellation Status: Cancellation
Reinstatement (Pending Cancellation)	When the client already exists and a matching policy is located, the policy is downloaded to the policy summary page. Policy Mode: New, if the policy does not already exist. If the policy does exist, the mode will remain as indicated in the previous version. Stage: Policy Status: Received
Reinstatement (Policy in History)	When the client already exists and a matching policy is located in history, the downloaded policy is sent to the policy summary page. The cancelled policy will remain in history. Policy Mode: New, if the policy does not already exist. If the policy does exist, the mode will remain as indicated in the previous version. Stage: Policy Status: Received

TIPS AND FACTS

Rewrite (Current or prior effective date)	When the client already exists and has a matching policy, the policy downloads to the policy summary page. The cancelled policy will remain in history or will remain on policy summary if on the current policy list. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Policy Status: Rewritten
Rewrite (Future effective date)	When the client already exists and has a matching policy, the policy downloads to the policy summary page. The previous version is not moved. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Policy Status: Rewritten
Reissue (Current or prior effective date)	When the already client exists and a matching policy is located, the policy downloads to the policy summary page. The old version of the policy remains on the policy summary page and when complete may be sent to history manually. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Policy Status: Rewritten
Reissue (Future effective date)	When the already client exists and a matching policy is located, the the policy downloads to the policy summary page. The old version of the policy remains on the policy summary page and when complete may be sent to history manually. Policy Mode: New if the policy did not exist. If the policy does exist, the mode will remain as indicated on the prior version. Stage: Policy Status: Rewritten

TIPS AND FACTS

Database synchronization	For policies from a database synchronization containing an existing client without a matching policy, the policy is downloaded to the policy summary page. Should the policy already exist, the policy on the policy summary is automatically moved to history and replaced with the newly downloaded version.
	Policy Mode: New, if the policy does not already exist. If the policy does exist, the mode will remain as indicated in the previous version. Stage: Policy Status: Rewritten