



TIPS AND FACTS

Issue 4

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- ✦ Download Import Status Details

Download Import Status Details

Import Status	Description
Aborted	This means the file failed or was rejected by the agency. Contact support to reset the record if needed.
Application Exception	Line of business with ?? displays as the exception link. Example (Auto??). The carrier did not provide the required state to identify what state specific data should be populated. If this occurs, notify the support department at XDimensional Technologies, Inc. and inform them as to what state should be populated.
Branch Exception	<p>The branch was not located in the system. The Branch Code on the commissions tab has not been set up for the Downloading Carrier NAIC Code. To add it, follow the steps below:</p> <ul style="list-style-type: none"> ▪ Go to the Search screen ▪ Search for the carrier ▪ Click the Details  icon of the carrier ▪ Click on the Commissions tab to verify the carrier is associated with the appropriate branch code under the appropriate Line of Business commission record. <p>Note: Commissions must be setup for each line of business being downloaded.</p>



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<p>Cancellation Date Exception</p>	<p>The cancellation date falls outside of the policy term.</p> <ul style="list-style-type: none"> ▪ Click on the red Exception link. ▪ Select the policy to download the data to and click [Next]. <ul style="list-style-type: none"> ○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data. ○ The following only occurs if no policies exist for this client: You will be prompted to “Create Empty Policy”. Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data which is in history.
<p>Carrier Exception</p>	<p>The carrier could not be found in the system. Either the carrier name and/or NAIC code haven’t been entered.</p> <ul style="list-style-type: none"> ▪ From the Search screen, search for the carrier. ▪ Click the Details  icon of the carrier. ▪ Click on the Carrier Name tab to verify the NAIC code. ▪ If the NAIC code does not exist, click the Details  icon beside the carrier name, add the code and update the record. <p>Note: The issuing carrier checkbox must be selected.</p>
<p>Client Exception</p>	<p>The client could not be found in the system. An exact match for the client name has not been found.</p> <ul style="list-style-type: none"> ▪ Click on the red <u>Client could not be found. Click here to search existing clients, or click Accept to create a new client</u> link. ▪ In the pop-up window, search for the client by first or last name only or by policy number. <ul style="list-style-type: none"> ○ If the client is located, highlight the appropriate name and click the [Use Selection] link. The Data is then queued for reprocessing. ○ If client does not exist, click on the Add New link then click the [Add Client] link to create the new client. The record is queued for reprocessing.



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Department Exception	<p>This will occur if the you have added a new client. To process and clear the department exception:</p> <ul style="list-style-type: none"> ▪ Click on the red Exception link. ▪ Select the department and click OK.
Endorsement Date Exception	<p>The endorsement date falls outside of the policy term.</p> <ul style="list-style-type: none"> ▪ Click on the red Exception link. ▪ Select the policy to download the data to and click [Next]. Nexsure moves the selected policy to the history tab and the downloaded data becomes the current policy. <ul style="list-style-type: none"> ○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data. ○ The following only occurs if no policies exist for this client: You will be prompted to "Create Empty Policy". Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.
Import Completed	<p>The file has successfully been downloaded.</p>
LOB Exception	<p>The Line Of Business is not currently supported for downloads in Nexsure. If this occurs, place a check in the box beside the policy(s) and select the reject link on the navigation toolbar.</p>
Memo	<p>This is an Underwriting memo sent from the carrier that has been read. May be removed or attached to the client.</p>
NAIC Code Exception	<p>Only applicable in CA and AZ. The NAIC code has not been set up in Nexsure. To correct this, follow the steps below:</p> <ul style="list-style-type: none"> ▪ Add the NAIC code on the carrier. ▪ Click the check box beside the policy and the accept link on the navigation toolbar. The policy will re-process.
New Memo	<p>This is an Underwriting memo sent from the carrier that has not been read. You can view, print or save to your desktop and/or attach to the client.</p>



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<p>Policy Exception</p>	<p>The policy cannot be located. Cannot find a matching policy # with NAIC code in the client's Policies-History and -Policies tabs.</p> <ul style="list-style-type: none"> ▪ Click on the red Exception link. ▪ Select the policy to download the data to and click [Next]. Nexsure moves the selected policy to the history tab and the downloaded data becomes the current policy. <ul style="list-style-type: none"> ○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data. ○ The following only occurs if no policies exist for this client: You will be prompted to "Create Empty Policy". Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.
<p>Policy Exception Cancellation</p>	<p>The policy cannot be located. Cannot find a matching policy # with NAIC code in client's Policies-History and -Policies tabs.</p> <ul style="list-style-type: none"> ▪ Click on the red Exception link. ▪ Select the policy to download the data to and click [Next]. <ul style="list-style-type: none"> ○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data. ○ The following only occurs if no policies exist for this client: You will be prompted to "Create Empty Policy". Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data which is in history.



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<p>Policy Exception Endorsement</p>	<p>The policy cannot be located. Cannot find a matching policy # with NAIC code in client's Policies-History and -Policies tabs.</p> <ul style="list-style-type: none"> ▪ Click on the red Exception link. ▪ Select the policy to download the data to and click [Next]. Nexsure moves the selected policy to the history tab and the downloaded data becomes the current policy. <ul style="list-style-type: none"> ○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data. ○ The following only occurs if no policies exist for this client: You will be prompted to "Create Empty Policy". Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.
<p>Policy Exception Reinstatement</p>	<p>Cannot find a matching policy # with NAIC code in client's Policies-History and -Policies tabs.</p> <ul style="list-style-type: none"> ▪ Click on the red Exception link. ▪ Select the policy to download the data to and click [Next]. Nexsure moves the selected policy to the history tab and the downloaded data becomes the current policy. <ul style="list-style-type: none"> ○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data. ○ The following only occurs if no policies exist for this client: You will be prompted to "Create Empty Policy". Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.



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Possible Duplicate	<p>Nexsure believes that this information already exists in the system.</p> <ul style="list-style-type: none"> ▪ Go to the client policies and verify the information. ▪ Go back to the interface and place a check in the box next to the exception. Click either accept or reject. <ul style="list-style-type: none"> ○ Selecting accept will process the policy. ○ Selecting reject will abort the transaction disallowing further action.
Processing Client	Searching or creating a client record. No action required on this status.
Processing Policy	Searching or creating a policy. No action required on this status.
Producer Exception	(Only applicable in CA and AZ for FSC) The producer on the downloaded file is not entered in Nexsure. Add the producer into Nexsure Branch Employee. Click the Check box beside policy and the accept link on the navigation toolbar to re-process.
Queued for Re-Processing	Item is being processed. No action required on this status.
Reinstatement Date Exception	<p>The endorsement date falls outside of the policy term.</p> <ul style="list-style-type: none"> ▪ Click on the red Exception link. ▪ Select the policy to download the data to and click [Next]. Nexsure moves the selected policy to the history tab and the downloaded data becomes the current policy. <ul style="list-style-type: none"> ○ If the policy that is being downloaded does not exist on the current policy list, go back to the download file, place a check in the box to the left of the policy and click accept. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data. ○ The following only occurs if no policies exist for this client: You will be prompted to "Create Empty Policy". Click on the [Yes] link. Nexsure creates an empty policy, sends it to history, and replaces the empty policy with the downloaded data.