



## TIPS AND FACTS

### Issue 11

#### IN THIS ISSUE

- ✖ Using Application Helper

### Using Application Helper

The **Nexsure Application Helper** has three different options to choose from. The first allows the Producer and Applicant sections to populate from the primary branch assignment and primary client and location information. The second option helps save time by allowing applications to be copied that were created for other policies with the same line of business. For example, an existing ACORD 125 can be copied. The third option allows an entirely blank form to be added. Below are the steps for using these options.

The screenshot shows the Nexsure web application interface. At the top, there is a navigation bar with links for HOME, HELP, SETUP, and LOGOUT. Below this is a search bar and a menu with options like ORGANIZATION and REPORTS. The main content area displays a form for a client named 'One Stop Shopping'. The form includes fields for Branch (Atlantic Branch), Policy Type (Package), Issuing Co (Hartford), Billing Co (Hartford), Policy Number (Unassigned), and various dates and times. A navigation menu on the right side is expanded to show 'Underwriting' options: Base Requirements, Garage and Dealers, and Other. At the bottom of the form, there are several links: [Import], [ACORD XML], [Supplements], and [Add Application].

1. Click the **[Add Application]** link to display the available Lines of Business.



## TIPS AND FACTS

The **New Application Selection** pop-up window is displayed.

2. The **Form Standard** field defaults to **All**. Select the appropriate **Form Standard** from the drop-down box to narrow the **Available Applications**.

3. The **State** drop-down box defaults to the **State** selected for the suspect. If the **State** drop-down box displays **ALL**, then a state wasn't entered in the primary location address at client level. Click the drop-down box and select the appropriate state. (Make sure to go back to Client profile level and add the state to the primary location).

**New Application Selection** nexsure

Form Standard: All

State: California

Type: Commercial Lines

Lines of Business: Commercial Property

Available Applications:

- Commercial Property
- Commercial Property - Restaurant

Description: ACORD Commercial Property [UWN, 125, 140]

Nexsure Application Helper	
<input checked="" type="radio"/>	Basic Pre-fill: Producer and Applicant Information prefilled.
<input type="radio"/>	Pre-fill from other application: Producer, Applicant and other policy detail prefilled.
<input type="radio"/>	Blank Application: Nothing prefilled.

Cancel Next

4. The **Type** drop-down box defaults to the client type selected when the card file was created. If the **Type** needs to be changed, click the drop-down box to select the appropriate client **type**.

5. The **Lines of Business** drop-down box displays all Lines of Business applicable to the **Form, State** and **Type** selected. Select the **Line of Business** to add.



## TIPS AND FACTS

6. If the **Line of Business** in the **Available Applications** window is not highlighted, click the **application** to select it.

The description of the form selected, along with the ACORD form number(s), will be displayed below the **Available Applications** box.

**New Application Selection** nexsure

Form Standard:  ▼

State:  ▼

Type:  ▼

Lines of Business:  ▼

Available Applications:

- Commercial Property
- Commercial Property - Restaurant

Description: ACORD Commercial Property [UWN, 125, 140]

Nexsure Application Helper	
<input checked="" type="radio"/>	Basic Pre-fill: Producer and Applicant Information prefilled.
<input type="radio"/>	Pre-fill from other application: Producer, Applicant and other policy detail prefilled.
<input type="radio"/>	Blank Application: Nothing prefilled.

The **Nexsure Application Helper** is now available to pre-fill the application(s):

*Option One*     **Basic Pre-fill:** This is selected by default, which pre-fills basic client information.

*Option Two*     **Pre-fill from other application:** Selecting this option will allow you to select an application (same line of business) that has previously been completed to pre-fill information to this application.

*Option Three*     **Blank Application:** Selecting this option will pre-fill nothing to this application.



## TIPS AND FACTS

**Option One:** Selecting the **Basic Pre-fill** option.

Select the **Basic Pre-fill** option.

**New Application Selection** nexsure

Form Standard: All

State: California

Type: Commercial Lines

Lines of Business: Commercial Property

Available Applications:

- Commercial Property
- Commercial Property - Restaurant

Description: ACORD Commercial Property [UWN, 125, 140]

Nexsure Application Helper	
<input checked="" type="radio"/>	Basic Pre-fill: Producer and Applicant Information prefilled.
<input type="radio"/>	Pre-fill from other application: Producer, Applicant and other policy detail prefilled.
<input type="radio"/>	Blank Application: Nothing prefilled.

Cancel Next

Click the **Next** button.



## TIPS AND FACTS

The **Policy type** in the header will be changed to **Monoline** when the first line of business is added.

Branch: **Atlantic Branch** Policy Term: 12:01AM  
 09/26/2005 CST  
 09/26/2006 CST

Policy Type: **Monoline** Coverage Term: CST

Issuing Co: Unassigned Stage: Marketing  
 Billing Co: Unassigned Mode: New  
 Policy Number: Unassigned Status: Pending

Actions: [List] [Rate] [Bridge] [Print] [History] [In Force] [Save Changes]

Actions: **Details** | Topic | Type | Status | Memo  
 Marketing Annotation Closed Process new marketing application.

Base Forms: [Import] [ACORD XML] [Supplements] [Add Application]

Forms	Description	Remove
Narrative	Underwriting Narrative	
ACORD 125	Commercial Application 125	

Line of Business:

Lines of Business	Form	Description	Remove
Garage and Dealers	ACORD 128 CA	Garage and Dealers Section 128-138 CA	

The Line of Business form is displayed beneath the header.

If this is a **Package** policy, click the **[Add Application]** link to add other Lines of Business. The **Policy type** in the header is changed to **Package** as other forms are added.



## TIPS AND FACTS

**Option Two:** Selecting the **Pre-fill from other application** option.

Select the “**Pre-fill from other application**” option to copy any previously completed applications for this client.

**New Application Selection** nexsure

Form Standard: All

State: California

Type: Commercial Lines

Lines of Business: Garage and Dealers

Available Applications:

- Garage & Dealers CA

Description: ACORD Commercial Garage & Dealers [UWN, 125, 128-138 CA]

Nexsure Application Helper	
<input type="radio"/>	Basic Pre-fill: Producer and Applicant Information prefilled.
<input checked="" type="radio"/>	Pre-fill from other application: Producer, Applicant and other policy detail prefilled.
<input type="radio"/>	Blank Application: Nothing prefilled.

Cancel Next

Click the **Next** button.



## TIPS AND FACTS

The **Application Helper: Pre-fill Data Selection** screen is displayed.

When using the **Application Helper**, make sure to copy from any available forms to avoid the unselected form such as narrative being added without any data.

Select the forms to copy from.

Click the **Accept** button to add the copied forms.



## TIPS AND FACTS

The Line of Business form is displayed beneath the header.

The **Policy type** in the header will be changed to **Monoline** when the first line of business is added.

The screenshot displays the 'underwriting' interface. At the top, there are tabs for 'policy info', 'assignment', 'attachments', 'actions', 'qualification', 'history', 'transactions', 'claims', and 'summary of insurance'. The main header area shows:

- Branch: Atlantic Branch
- Policy Term: 09/26/2005 CST to 09/26/2006 CST
- Policy Type: **Monoline**
- Coverage Term: (blank)
- Issuing Co: Unassigned
- Billing Co: Unassigned
- Policy Number: Unassigned
- Stage: Marketing
- Mode: New
- Status: Pending

Below the header is a table of 'Lines of Business':

Lines of Business	Form	Description	Remove
Garage and Dealers	ACORD 128 CA	Garage and Dealers Section 128-138 CA	[Remove]

Other elements include a 'navigation' sidebar with 'Underwriting' selected, and a 'Base Forms' table with 'Narrative' and 'ACORD 125' listed. A red arrow points from the 'Policy Type' text to the 'Monoline' dropdown. Another red arrow points from the 'Line of Business' text to the 'Garage and Dealers' row in the table.

Edit the copied forms as necessary to complete the process.

If this is a **Package** policy, click the **[Add Application]** link to add other Lines of Business. The **Policy type** in the header is changed to **Package** as other forms are added.



## TIPS AND FACTS

**Option Three:** Selecting the **Blank Application** option.

Select the **Blank Application** option after selecting the line of business if a blank application is desired.

**New Application Selection** nexsure

Form Standard: All

State: California

Type: Commercial Lines

Lines of Business: Crime

Available Applications:

- Crime
- Crime (Includes Burglary)

Description: ACORD Crime Section [UWN, 125, 141]

Nexsure Application Helper	
<input type="radio"/>	Basic Pre-fill: Producer and Applicant Information prefilled.
<input type="radio"/>	Pre-fill from other application: Producer, Applicant and other policy detail prefilled.
<input checked="" type="radio"/>	Blank Application: Nothing prefilled.

Cancel Next

Click the **Next** button.



## TIPS AND FACTS

A blank application is added.

ACORD CRIME SECTION				DATE			
PRODUCER		PHONE (A/C, No, Ext):		APPLICANT (First Named Insured)			
EFFECTIVE DATE		EXPIRATION DATE		DIRECT BILL		PAYMENT PLAN	
				AGENCY BILL		AUDIT	
CODE:		SUB CODE:		FOR COMPANY USE ONLY			
AGENCY CUSTOMER ID:				BASIS FOR COVERAGE			
				DISCOVERY			
				LOSS SUSTAINED			
PLAN 1							
FORM LTR	FORM TITLE	LIMIT	DEDUCTIBLE	FORM LTR	FORM TITLE	LIMIT	DEDUCTIBLE
	EMPLOYEE DISHONESTY			E	PREMISES BURGLARY	\$	