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TIPS AND FACTS

Issue 14

IN THIS ISSUE

✖ Understanding the Date and Icon Colors on Home Pages

Understanding the Date and Icon Colors on Home Pages

HOME > ACTIONS

The **HOME > ACTIONS** screen can be accessed by clicking the **HOME** link on the **Utility** menu.

When located in another area of the Home page, click the **ACTIONS** link to access the **HOME > ACTIONS** screen.

All actions on the **HOME > ACTIONS** page are displayed with a specific colored number to help determine visually when actions are getting closer to or past their due date.

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TIPS AND FACTS

The **Days Left (Over Due By)** displays a number countdown of days the action is due or overdue. The number is displayed in one of three colors and changes based on what the current date is in relation to the due date of the action.

The definitions of these color coded numbers are as follows:
- **Green** indicates more than five days before the due date.
- **Orange** indicates five days or less before the due date.
- **(Red)** indicates the number of days past the due date.

> *Note: These same colors are seen on Client Actions as well as at Policy level and have the same meaning.*

HOME > BINDER LOG

Use the Coverage Expiration date on the **HOME > BINDER LOG** to determine when binders should be extended and to follow-up on receipt of the policy or change. These color coded dates are to help you determine visually when binders are getting closer to their expiration date.

The binder **Coverage Exp Date** is displayed in one of four colors and changes based on what the current date is in relation to the binders coverage expiration date.
- **Black** indicates that the binder will expire in 90 days or more.
- **Green** indicates that the binder will expire in the next 89 – 31 days.
- **Orange** indicates that the binder will expire in the next 30 days.
- **Red** indicates that the binder has expired.

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HOME > EXPIRATIONS

The **HOME > EXPIRATIONS** page shows policies that will be expiring within the selected date range. Both the **Detail** icons and the policy term expiration dates are color coded to help you determine visually when the policy is getting closer to the expiration date.

When you first login to Nexsure the **HOME > ACTIONS** page is displayed, click the **EXPIRATIONS** link from any Home page.

The policy **Detail** icons can display in one of three colors. Two of the three colors appear on the **HOME > EXPIRATIONS** page. The third color is only shown in Client Policy and history levels. That third color is green which indicates a renewed policy. When a policy is renewed it no longer appears on the **HOME > EXPIRATIONS** page. The two **Detail** icons displayed on the **HOME > EXPIRATIONS** page are defined as follows:
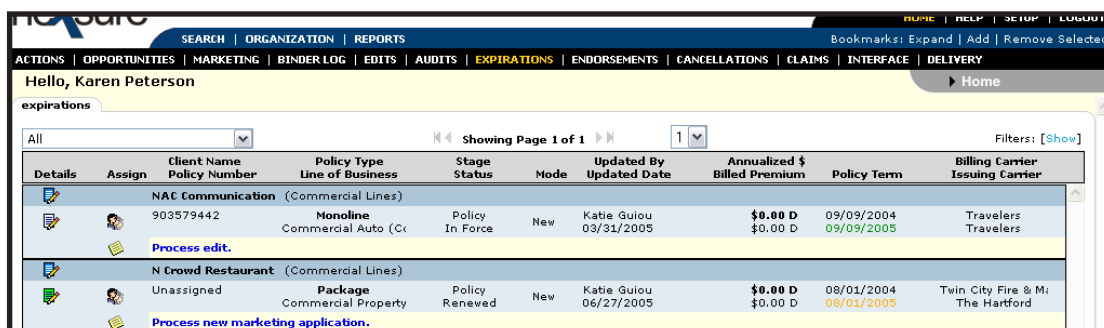
- The White indicates that the policy status is still in force.
- The **Red** indicates that the policy is expired and no longer in force.

Note: These same icon colors are seen on other home pages as well as on the Policies Summary and have the same meaning.

The color coded **Policy Term** dates help visually determine when polices are getting closer to their expiration date. There are four expiration date colors and these are defined as follows:

- **Black** indicates that the policy is greater than 90 days from the expiration date.
- **Green** indicates that the policy will expire within 90 days or less.
- **Orange** indicates that the policy will expire is 30 days or less.
- **Red** indicates that the policy has expired.

Note: These same colors are seen on the Policies Summary and have the same meaning.

TIPS AND FACTS

HOME > ENDORSEMENTS

The **HOME > ENDORSEMENTS** page shows the coverage term dates for unposted endorsements within the selected date range. Both **Detail** 📝 icons and the coverage term expiration dates are color coded to help visually determine when the policy is nearing the expiration date. The last updated dates may be used in conjunction with the coverage term effective dates to determine when a second request from the carrier should be made.

When you first login to Nexsure, the **HOME > ACTIONS** page is displayed, click the **ENDORSEMENTS** link from any Home page.

The policy **Detail** 📝 icons appear in one of two colors on the Home-Endorsements page and are defined as follows:

- 📝 The White indicates that the policy status is still in force.
- 📝 The **Red** indicates that the policy is expired and no longer in force.

The color coded **Coverage Exp Dates** help visually determine when coverage will expire. There are four expiration date colors and these are defined as follows:

- **Black** indicates that the policy is greater than 90 days from the coverage expiration date.
- **Green** indicates that the coverage will expire within 90 days or less.
- **Orange** indicates that the coverage will expire is 30 days or less.
- **Red** indicates that the coverage has expired.

Note: The Coverage Eff Date is when the change is effective and the Coverage Exp Date is when the coverage expires.

endorsements							
All			◄◄ Showing Page 2 of 2 ►►	2			Filters: [Show]
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Last Updated	Annualized $ Billed Premium	Coverage Eff Date Coverage Exp Date	Billing Carrier Issuing Carrier
📝		**Rugged Tires**	(Commercial Lines)					
📝	👤	EDP-98098908	**Monoline** Electronic Data Proce	Endorsement Pending	Mary Oberleitn 10/04/2005	$0.00 D $0.00 D	10/04/2005 04/27/2007	Allied Insurance Allied Insurance
	📝	No Message(s).						
📝		**Beautiful World of Fl**	(Commercial Lines)					
📝	👤	AU-789749749832	**Monoline** Commercial Auto (A	Endorsement Pending	Mary Oberleitn 10/10/2005	$0.00 A $0.00 A	11/10/2005 10/21/2005	Auto Owners Auto Owners
	📝	Process endorsement.						

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TIPS AND FACTS

HOME > CANCELLATIONS

The **HOME > CANCELLATIONS** page shows the coverage term dates for the pending cancellations within the selected date range. Both **Detail** icons and the coverage term expiration dates are color coded to help determine visually when the policy is getting closer to the expiration date. The last updated dates in conjunction with the coverage term expiration dates may be used to determine when to request a second request from the carrier or call them.

When you first login to Nexsure the **HOME > ACTIONS** page is displayed, click the **CANCELLATIONS** link from any Home page.

The policy **Detail** icons appear in one of two colors on the **HOME > CANCELLATIONS** page and are defined as follows:

- The **White** indicates that the policy status is still in force.
- The **Red** indicates that the policy is expired and no longer in force.

The color coded **Coverage Exp Dates** help visually determine when coverage will expire. There are four expiration date colors and these are defined as follows:

- **Black** indicates that the policy is greater than 90 days from the coverage expiration date.
- **Green** indicates that the coverage will expire within 90 days or less.
- **Orange** indicates that the coverage will expire is 30 days or less.
- **Red** indicates that the coverage has expired.

> *Note: The Coverage Term Expiration Date is when the coverage expires.*

| Details	Assign	Client Name / Policy Number	Policy Type / Line of Business	Stage / Status	Updated By / Last Updated	Annualized $ / Billed Premium	Coverage Eff Date / Coverage Exp Date	Billing Carrier / Issuing Carrier
		Rugged Tires	(Commercial Lines)					
		BOP	**Monoline** BOP	Policy Pending Cance	Mary Oberleitn 07/20/2005	**$0.00 D** $0.00 D	07/11/2005 08/20/2005	Auto Owners Auto Owners
		Process cancellation.						
		Janet Anderson	(Personal Lines)					
		GL-4654564	**Monoline** Commercial Auto (A	Policy Pending Cance	Mary Oberleitn 10/12/2005	**$0.00 D** $0.00 D	11/11/2004 10/12/2005	Safeco Ins. Safeco Ins.
		No Message(s).						
		Boat-7987348	**Monoline** Watercraft (small bo	Policy Pending Cance	Mary Oberleitn 08/22/2005	**$0.00 D** $0.00 D	08/07/2005 10/15/2005	American Superior American Superior
		No Message(s).						
		Winston Auto Parts	(Commercial Lines)					
		PR-776545	**Monoline** Commercial Property	Policy Pending Cance	Mary Oberleitn 08/26/2005	**$0.00 A** $0.00 A	08/23/2005 10/26/2005	Hartford Hartford
		Process cancellation.						
		Block Buster	(Commercial Lines)					
		1234567	**Monoline** Commercial Auto	Policy Pending Cance	Mary Oberleitn 01/11/2005	**$1,000.00 D** $1,000.00 D	01/11/2005 01/11/2006	Allied Insurance Allied Insurance
		Added 2004 Ford Mustang						
		Masons Grill	(Commercial Lines)					
		Contract#89347838€	**Monoline** Other (OTHER)	Policy Pending Cance	Mary Oberleitn 08/24/2005	**$0.00 A** $0.00 A	01/14/2005 01/14/2006	Premium Assignm Premium Assignm

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