



### IN THIS ISSUE

- ✘ Policy Expiration Workflow

## Policy Expiration Workflow

At the Client level, click the **POLICIES** link on the **Client** menu to show all in force policies.

Show/Hide	Policy Number Policy Description	Policy Type Line of Business	Policy Term	Status Mode	Annualized Premium Estimated Premium	Billing Carrier Issuing Carrier
	GL-500000 GL policy	Monoline General Liability - Commercial	12/01/2008 12/01/2009	In Force New	\$0.00 A \$17,000.00 A	Penn National Penn National

A policy is expired when the expiration date is past the current date. When a policy expires in Nexsure, the expiration date is displayed with a **red** font and a red **Details** icon.

**Note:** The status of an expired policy is changed to **Expired** when the **Details** icon is clicked and the **OK** button is selected in the **Expired** status pop-up window.

## Handling an Expired Policy

Clicking the **Details** icon at any level where the policy expiration date is a date in the past (and the status is other than **Expired**) will prompt the **Expired** status pop-up window, which asks, **Do you wish to change the status to Expired?** The only time the policy should be changed to **Expired** is when the policy has not or will not be renewed.

If the expired policy has not or will not be renewed, click the **OK** button to change the status to **Expired**. Click **Cancel** to keep the current status if the policy has been or will be renewed.

Click the **OK** button to acknowledge the policy status change.

To send expired policies to history, click the **History** link on the underwriting screen.

In the pop-up window, choose **Non-Renewed** or **Lapsed** from the **Status** drop-down list (depending on the circumstance) and enter a description as to why the policy is not being renewed in the **Notes** box.

Click the **Save** button to send the expired policy to history.