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***** HOME > BINDER LOG

HOME > BINDER LOG

The **HOME > BINDER LOG** screen is used to make sure a new or renewed policy is received by the branch (with or without an open binder). Policies are listed on the **HOME > BINDER LOG > View: Agency Issued Binder** screen when a policy has an open binder. Policies with a status of **Future** or **Bound** (without an open binder added) are found in the alternate view on the **HOME > BINDER LOG** screen.

Future Status

When policies are renewed (See **Renew a Policy** in Chapter 14 of the Nexsure[®] CRM Training Manual) the status reflects as **Future**.

nexsure						Home Help Setup Logout		
	SEARCH ORGANIZATION	REPORTS				Bookmarks: Expand Add Remove Selected		
CLIENT PROFILE OPPOR	IUNITIES MARKETING 1	POLICIES CLAIMS	SERVICING	ATTACHMENTS	ACTIONS TRA	NSACTIONS DELIVERY T-LOG		
						Commercial Account		
underwriting policy info Branch: Policy Type:	assignment attachments Atlantic Branch Monoline	actions qualificat Policy Term Coverage T	ion history : Of erm: Of	transactions cla 5/12/2006 12:01A 5/12/2007 12:01A 5/12/2006 12:01A	ims summary of i M 😼 M 📭	navigation instruction Underwriting		
Issuing Co:	The Hartford Insurance C	c 💙 Stage:	00 Po	5/12/200712:01A olicy	M 4 0 4	Base Requirements Workers Compensation		
Billing Co:	The Hartford Insurance C	c 🗙 Mode:	Mode: Renew			instruction navigation		
Policy Number:	WC-8778544-01	Status:	Status: Future Non-renewing					
List		Print	History	In Force	Save Changes			

Renewing an expiring policy removes it from the **HOME > EXPIRATIONS** screen and adds it to the **HOME > BINDER LOG** screen under the **View: Bound/Future – No Open Binders**.

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binder log						~		
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View: Bound/Future - No Oper	n binde 💌	Showing Pa	age 1 of 1 ▶ 🕅 🛛 1	*		Filters: [Hide]		
Search Filters						Save Filter Settings 📘		
Client Name:	Cvg. Eff. Date (Fr):	19	Cvg. Eff. Date (To):		Assignment:	Mary Oberleitner		
Client Type: All	💉 Cvg. Exp. Date (Fr):		Cvg. Exp. Date (To):		Responsibility:			
Policy Status: All	Issuing Carrier:		LOB:		Updated By:			
Bill Method: All	🖌 Updated Date (Fr):	.0	Updated Date (To):		Retail Agent:			
Sort Filters								
Sort Field 1: Coverage Exp D 🛩	Sort Order 1: A	scending 💌	Sort Field 2:	×	Sort Order 2:	×		
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Client Name Details Assign Policy Numbe	Policy Type r Line of Business	Stage Status	Updated By Last Updated	Annualized \$ Cov Billed Premium Cov	erage Eff Date erage Exp Date	Billing Carrier Issuing Carrier		



Bound Status without an Open Binder

Policies without a binder (See **Binders** in Chapter 8 of the Nexsure[®] CRM Training Manual) with a mode of **New**, **Renew** or **Re-New-Co** and a status of **Bound** will be displayed on the **HOME > BINDER LOG** screen.

				Commercial Account
erwriting policy info	assignment attachments	actions qualification	history transactions claims summar	y of insurance
Branch:	Atlantic Branch	Policy Term:	12:01AM	navigation instruction
			06/09/2007 12:01AM	Underwriting
Policy Type:	Monoline	Coverage Term:	12:01AM 06/09/2006 CST 12	Base Requirements Boiler and Machinery
			08/08/2006 12:01AM ¹⁰⁴ CST	instruction navigation
ssuing Co:	The Hartford Insurance Co.	Stage:	Policy	
illing Co:	The Hartford Insurance Co.	Mode:	New	
olicy Number:	Unassigned	Status:	Bound Non-renewing	
List		Print His	story In Force Save Change	25
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ent Name:	Cig. Eff. Da	te (Fr):	Cvg. Eff. Date (To):	Assignment: Mary Oberleitner
ient Type: All	💉 Cvg. Exp. Da	te (Fr):	Cvg. Exp. Date (To):	Responsibility:
icy Status: All	V Issuing (Carrier:	LOB:	Updated By:
ill Method: All	💉 Updated Da	te (Fr):	Updated Date (To):	Retail Agent:
ort Field 1: Coverag	e Exp D 😪 🛛 Sort C	order 1: Ascending 🔽	Sort Field 2:	Sort Order 2:
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Bound Status with an Open Binder

To access bound policies with an open binder, click the **HOME > BINDER LOG** link to bring up the default view for the logged in user without date restrictions. The default value under the **View:** drop-down list is **Agency Issued Binders**.

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			SEARCH ORGA	NIZAT A REPORTS				Bookmarks: Exp	and Add Remove S	Selected
ACTI	ONS	OPPORTUN	ITIES MARKETING	BINDER LOG EDIT ;	AUDITS EXPIR	ATIONS ENDORSEMEN	TS CANCELLATIONS	CLAIMS INTERFA	CE DELIVERY	
-	► Home									
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Bra	inch:	All		✓						
V	View: Agency Issued Binders K Showing Page 1 of 1 DM 1						now]			
De	etails	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	
	>		Winston Auto Parts	(Commercial Lines)						
	>	20	UMB-9867698	Monoline Umbrella - Commerc	Policy In Force	Mary Oberleitn 06/06/2006	\$0.00 D \$0.00 D	05/06/2006 07/05/2006	Hartford	
	>		Busy Bee Crafts	(Commercial Lines)						
	>	20	Unassigned	Monoline Boiler and Machinery	Policy Bound	Mary Oberleitn 06/06/2006	\$0.00 D \$0.00 D	06/19/2006 08/18/2006	The Hartford Insurance Co.	