



IN THIS ISSUE

✖ 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**.

The screenshot shows the 'View: Agency Issued Binder' screen. The policy details are as follows:

Branch:	Atlantic Branch	Policy Term:	06/12/2006 12:01AM
Policy Type:	Monoline	Coverage Term:	06/12/2006 12:01AM
Issuing Co:	The Hartford Insurance Cc	Stage:	Policy
Billing Co:	The Hartford Insurance Cc	Mode:	Renew
Policy Number:	WC-8778544-01	Status:	Future <input type="checkbox"/> Non-renewing

Navigation options include: 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**.

The screenshot shows the 'binder log' screen with the following search filters:

- Branch: All
- View: Bound/Future - No Open binders
- Showing Page 1 of 1
- Filters: [Hide]
- Client Name: [] Cvg. Eff. Date (Fr): [] 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): [] Updated Date (To): [] Retail Agent: []
- Sort Field 1: Coverage Exp D Sort Order 1: Ascending Sort Field 2: [] Sort Order 2: []

Buttons: Clear, Search

Details	Assign	Client Name	Policy Type	Stage	Status	Updated By	Annualized \$	Coverage Eff Date	Billing Carrier
		Policy Number	Line of Business			Last Updated	Billed Premium	Coverage Exp Date	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

underwriting policy info assignment attachments actions qualification history transactions claims summary of insurance

Branch:	Atlantic Branch	Policy Term:	12:01AM 06/09/2006 CST 06/09/2007 12:01AM CST
Policy Type:	Monoline	Coverage Term:	12:01AM 06/09/2006 CST 08/08/2006 12:01AM CST
Issuing Co:	The Hartford Insurance Co.	Stage:	Policy
Billing Co:	The Hartford Insurance Co.	Mode:	New
Policy Number:	Unassigned	Status:	Bound <input type="checkbox"/> Non-renewing

navigation instruction

Underwriting

- Base Requirements
- Boiler and Machinery

instruction navigation

List Print History In Force Save Changes

1. Clicking the **HOME > BINDER LOG** link will 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**.

binder log

Branch: All

View: Agency Issued Binders

Showing Page 1 of 1

Filters: [Hide]

Save Filter Settings

Client Name: Cvg. Eff. Date (Fr): 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): Updated Date (To): Retail Agent:

Sort Filters

Sort Field 1: Coverage Exp D Sort Order 1: Ascending Sort Field 2: Sort Order 2:

Clear Search

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
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2. To bring up policies with a status of **Future** and/or **Bound** without a binder, click the **View:** drop-down list (under the **Branch:** drop-down list) and select **Bound/Future - No Open binders**.

binder log

Branch: All

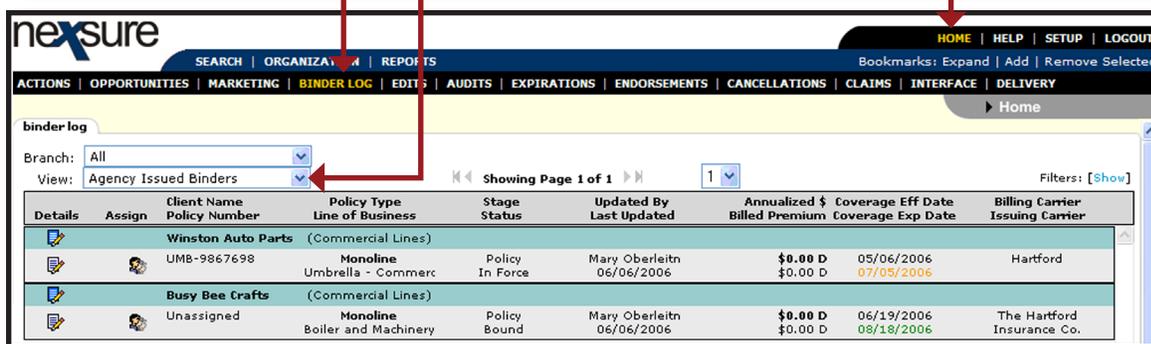
View: Agency Issued Binders

Search F Agency Issued Binders
Bound/Future - No Open Binder



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**.



The screenshot shows the 'binder log' page in the nexsure application. The 'View' dropdown is set to 'Agency Issued Binders'. The table below displays the following data:

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
Winston Auto Parts (Commercial Lines)								
		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)								
		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.