



IN THIS ISSUE

- ✘ Renewing Policies

Renewing Policies

The **SERVICING > Renew** option is used when an expiring policy term is ready to be renewed. The workflow is the same whether re-marketing or renewing the current policy.

Step 1 – Access the Client

A client record may be accessed from the **HOME > EXPIRATIONS** list or by accessing the client from the **SEARCH** screen.

Accessing the Client from HOME > EXPIRATIONS

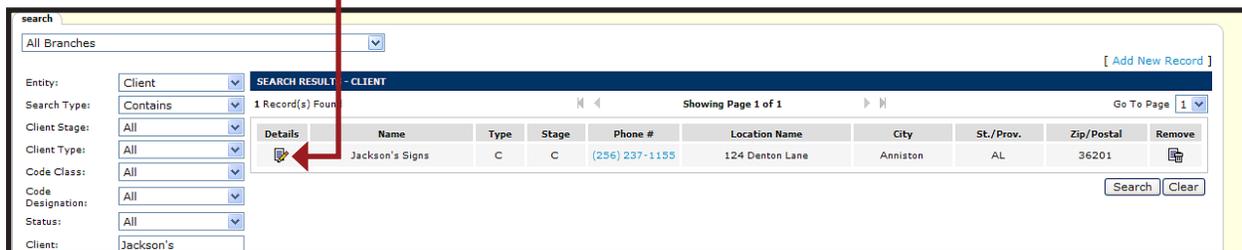
Click on the **Details**  icon with the blue border.



Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier
		Jackson's Signs Cpp-600000-1	(Commercial Lines) Package General Liability - Cc	Policy In Force	New	Mary Oberleitn 12/02/2009	\$0.00 D \$0.00 D	12/08/2008 12/08/2009	Penn National Penn National

Accessing the Client from the Search Screen

Access the client after searching from the **SEARCH** screen by clicking the **Details**  icon.



Entity:	Client	SEARCH RESULT - CLIENT	
Search Type:	Contains	1 Record(s) Found	Showing Page 1 of 1
Client Stage:	All		
Client Type:	All		
Code Class:	All		
Code Designation:	All		
Status:	All		
Client:	Jackson's		

Details	Name	Type	Stage	Phone #	Location Name	City	St./Prov.	Zip/Postal	Remove
	Jackson's Signs	C	C	(256) 237-1155	124 Denton Lane	Anniston	AL	36201	

The screenshot shows the 'Client Profile' page for 'Jackson's Signs'. The page is divided into several sections:

- Jackson's Signs Information:** Website: www.xdti.com; Primary Contact: Mr. Alan Howard, Title: Owner, E-Mail: maryo@xdti.com, Business Phone: (256) 237-1155, Business Fax: (256) 227-1156.
- Mailing Address:** Location Type: Office, Address: 124 Denton Lane, City: Anniston, State/Province: AL, Zip/Postal: 36201, Country: United States, International Info: Business Phone: (256) 237-1155, Fax Number: (256) 227-1156.
- Tracker:** Date Created: 12/2/2009, Client Since: 12/2/2009, Related Accounts: 0.
- Alerts:** Open Actions: 2.
- Stick-e-Note:** No Current Notes.
- In Force...:** General Liability - Commercial, Property - Commercial, Umbrella - Commercial.
- Assignment Information Table:**

Primary	Branch	Department	Unit	Responsibility	Name
<input checked="" type="checkbox"/>	Training - Implementation Branch	Commercial Lines - 30>20 Days AB1-2/DB2-3as	Unassigned	Producer	Mary Oberleitner

Step 2 – Servicing Screen

1. Click **SERVICING** on the **Client** menu and select the **Renewal** option.

The screenshot shows the 'Servicing' screen for 'Jackson's Signs'. The 'Renewal' option is selected in the left-hand menu. The main content area contains the following information:

- Services:** Marketing, Market Analysis, Binders, Edit, Endorsement, **Renewal**, Cancellation, Claim, Audit, New Certificate(s), Renewal Certificate(s).
- Enter a brief description of the renewal policy:** Renewing 2008/09 Commercial Package without the Umbrella. Umbrella will be a monoline policy.
- Enter additional notes to populate the action memo:** Renewing 2008/09 Commercial Package without the Umbrella. Umbrella will be a monoline policy this year.
- Refresh form prefills
- Select policy for renewal:** Showing Page 1 of 1
- Table:**

Select	Line Of Policy	Business Number	Stage Status Description	Mode	Updated By	Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Issuing Carrier	Billing Carrier
<input type="radio"/>	General Liability - CPP-46678-01		Policy In Force	Renew	Mary E Oberleitner	02/16/2011	\$0.00	04/25/2008	04/25/2009	Hartford Insurance	Hartford Insurance

2. Enter a description of the renewal in the **Enter a brief description of the renewal policy** box, press **Tab** on the keyboard and complete the description as necessary. The description will display in the **Enter additional notes to populate the action memo section** box of the action created and the brief description will display on the policy summary screen. Select the **Refresh form prefills** check box to refresh the client level data on the forms.



Step 3 – Selecting the Expiring Policy

1. If the policy is not displayed on the first page, use the navigation tools at the top of the page or click the **[Show]** link to search for the expiring policy.

renew

Page 1 of 1

Filters: [Show] [Back] [Next]

2. Locate and select the expiring policy in the **Select** column.

Client Name: Jackson's Signs

Commercial Account

Services: Marketing, Market Analysis, Binders, Edit, Endorsement, **Renewal**, Cancellation, Claim, Audit, New Certificate(s), Renewal Certificate(s), Verification(s)

This option is used to renew policies.

Enter a brief description of the renewal policy:

Enter additional notes to populate the action memo:

Refresh form prefills

Select policy for renewal: Showing Page 1 of 1

Search Filters:

Policy Number:	Term Eff. Date (Fr):	Term Eff. Date (To):	Updated By:
Policy Mode: All	Term Exp. Date (Fr):	Term Exp. Date (To):	LOB:
Policy Status: All	Cvg. Eff. Date (Fr):	Cvg. Eff. Date (To):	
Issuing Carrier:	Cvg. Exp. Date (Fr):	Cvg. Exp. Date (To):	
Billing Carrier:	Updated Date (Fr):	Updated Date (To):	

Sort Filters:

Sort Field 1: Line Of Business | Sort Order 1: Ascending | Sort Field 2: Eff Date | Sort Order 2: Ascending

Select	Line Of Business	Policy Number	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
<input type="radio"/>	General Liability - CPP-45678-01		Policy In Force	Renew	Mary E Oberleitner 02/16/2011	\$0.00	04/25/2008 04/25/2009	04/25/2008 04/25/2009	Hartford Insurance Hartford Insurance

3. Click the **[Next]** link on the upper right side of the screen.



Step 4 – Splitting the Policy or Combining to Create a Package

Splitting the Policy at Renewal

The expiring version of the policy is highlighted in yellow. However, only choose the applications that make up the renewal. If the version of the policy is in marketing, perform the following:

1. Click the **[Show]** link.

Select	Line Of Business Policy Number	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
<input type="checkbox"/>	Cpp-600000-1	Policy In Force Small Business Pc	New	Mary Oberleitner 12/02/2009	\$0.00 / \$0.00	12/08/2008 12/08/2009	12/08/2008 12/08/2009	Penn National Penn National
<input type="checkbox"/>		General Liability -			\$0.00 / \$0.00			
<input type="checkbox"/>		Property - Comm.			\$0.00 / \$0.00			
<input type="checkbox"/>		Umbrella - Comm.			\$0.00 / \$0.00			

2. Choose **Include Marketing** from the **Policy Stage** list. Click the **Search** button to return search results.

Policy Status: All Cvg. Eff. Date (Fr): Cvg. Eff. Date (To): Policy Stage: Include Marketing

Issuing Carrier: Cvg. Exp. Date (Fr): Cvg. Exp. Date (To): Include History: No

Billing Carrier: Updated Date (Fr): Updated Date (To):

Sort Filters
Sort Field 1: Line of Business Sort Order 1: Ascending Sort Field 2: Eff Date Sort Order 2: Ascending



3. Select the check boxes in the **Select** column to choose all the lines of business that will be included in the renewed policy. In this case, the carrier has advised the agency that the **Umbrella** policy will not be part of the package policy at renewal but will be renewed as a monoline policy. The carrier will write the policy as quoted and found in the **Stage of Marketing**. Therefore, the **Commercial Property** and **General Liability** are selected from the policies in the marketing stage instead.

nexsure

SEARCH | ORGANIZATION | REPORTS | CAMPAIGNS | ELINKS

HOME | HELP | SETUP | LOGOUT

CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | SERVICING | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG

Bookmarks: Expand | Add | Remove Selected

Commercial Account

Client Name: Jackson's Signs

servicing

Renewal Policy Mode: Renew

Filters: [Hide] [Back] [Next]

Save Filter Settings

Policy Number: Term Eff. Date (Fr): Term Eff. Date (To): Updated By:

Policy Mode: All Term Exp. Date (Fr): Term Exp. Date (To): LOB:

Policy Status: All Cvg. Eff. Date (Fr): Cvg. Eff. Date (To): Policy Stage: Include Marketing

Issuing Carrier: Cvg. Exp. Date (Fr): Cvg. Exp. Date (To): Include History: No

Billing Carrier: Updated Date (Fr): Updated Date (To):

Sort Filters

Sort Field 1: Line of Business Sort Order 1: Ascending Sort Field 2: Eff Date Sort Order 2: Ascending

Page 1 of 1

Select	Line Of Business	Policy	Stage	Status	Description	Mode	Updated By	Updated Date	Annualized \$	Policy	Coverage	Issuing Carrier
	Policy Number								Billed Premium	Term	Term	Billing Carrier
<input type="checkbox"/>	Cpp-600000-1	Policy In Force			Small Business Pc	New	Mary Oberleitner	12/02/2009	\$0.00 / \$0.00	12/08/2008	12/08/2008	Penn National
<input type="checkbox"/>	General Liability -								\$0.00 / \$0.00			
<input type="checkbox"/>	Property - Comm.								\$0.00 / \$0.00			
<input type="checkbox"/>	Umbrella - Comm.								\$0.00 / \$0.00			
<input type="checkbox"/>	Unassigned	Marketing			Pending	New	Mary Oberleitner	12/02/2009	\$0.00 / \$0.00	12/08/2009	12/08/2009	Penn National
<input checked="" type="checkbox"/>	General Liability -								\$0.00 / \$0.00			
<input checked="" type="checkbox"/>	Property - Comm.								\$0.00 / \$0.00			
<input type="checkbox"/>	Umbrella - Comm.								\$0.00 / \$0.00			

4. Click the **[Next]** link on the upper right corner.

Note: Before renewing a package policy that will no longer be a package policy at renewal, access the servicing screen, select **Market Existing** and choose only the single line of business that will make up the new monoline policy at renewal. When renewing the expired policy, make sure to choose the marketing line of business created. Doing this will ensure that the package total is not included on the **policy info** tab of the newly created future policy.

The renewal policy is created and has a **Status** of **Future**. Since the expiring policy had a **Mode** of **New**, the **Mode** may be changed from **Renew** to **New** or **New on Existing** if necessary. If the **Mode** of **Renew** is selected when the carrier is changed and saved, the **Mode** will change to **Re-New-Co** indicating a renewal to the agency but new to the carrier. Once changed, the **Mode** can no longer be modified.

The screenshot shows the 'SERVICING' section for a policy. The 'Policy Type/Primary State' is 'Package AL'. The 'Issuing Co.' and 'Billing Co.' are both 'Penn National'. The 'Policy Number' is 'Cpp-600000-1'. The 'Policy Description' is 'Small Business Policy'. The 'Status' is 'Future' and 'Non-renewing' is checked. The 'Mode' is set to 'Renew'. The 'Origination Date' is '12/08/2008'. The 'Policy Term' shows dates from 12/08/2009 to 12/08/2010. A navigation sidebar on the right shows 'Underwriting' with sub-items for 'Base Requirements', 'General Liability - Commercial', and 'Property - Commercial'.

In this example, the monoline Umbrella policy still needs to be renewed. To renew this policy as a monoline policy, repeat the steps above but this time only select the Umbrella policy in marketing.

The screenshot shows the 'SERVICING' section with the 'Renewal' option selected in the left-hand menu. The main area contains a form for entering a brief description of the renewal policy and additional notes. The description field contains 'Umbrella policy for 2009-2010 term will renew as monoline.' and the notes field contains 'Umbrella policy for 2009-2010 term will renew as monoline.' There is a 'Refresh from client profile' checkbox which is checked. A '[Next]' link is visible at the top right of the form area.

5. Select the recently renewed policy again and click the **[Next]** link.

The screenshot shows a table of policies. A red arrow points from the text above to the '[Next]' link in the top right corner of the table area. The table has the following columns: Select, Line Of Business, Policy Number, Stage Status Description, Mode, Updated By Updated Date, Annualized \$ Billed \$, Policy Term, Coverage Term, and Issuing Carrier Billing Carrier.

Select	Line Of Business	Policy Number	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billed \$	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
<input type="radio"/>	(General Liability	Cpp-600000-1	Policy Renewed Small Business Pc	New	Mary Oberleitner 12/02/2009	\$0.00 \$0.00	12/08/2008 12/08/2009	12/08/2008 12/08/2009	Penn National Penn National



6. Search to include the marketing applications and select the **Umbrella** policy quoted with **Penn National** carrier by selecting the check box in the **Select** column. Click the **[Next]** link.

Client Name: Jackson's Signs

Renewal Policy Mode: Renew

Search Filters:

Policy Number:	Term Eff. Date (Fr):	Term Eff. Date (To):
Policy Mode:	Term Exp. Date (Fr):	Term Exp. Date (To):
Policy Status:	Cvg. Eff. Date (Fr):	Cvg. Eff. Date (To):
Issuing Carrier:	Cvg. Exp. Date (Fr):	Cvg. Exp. Date (To):
Billing Carrier:	Updated Date (Fr):	Updated Date (To):

Sort Filters:

Sort Field 1: Line of Business | Sort Order 1: Ascending | Sort Field 2: Eff Date | Sort Order 2: Ascending

Select	Line Of Business	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
<input type="checkbox"/>	Cpp-600000-1	Policy Future Small Business Pc	Renew	Mary Oberleitner 12/02/2009	\$0.00 / \$0.00	12/08/2009 12/08/2010	12/08/2009 12/08/2010	Penn National Penn National
<input type="checkbox"/>	General Liability - Property - Comm.				\$0.00 / \$0.00			
<input type="checkbox"/>	Cpp-600000-1	Policy Renewed Small Business Pc	New	Mary Oberleitner 12/02/2009	\$0.00 / \$0.00	12/08/2008 12/08/2009	12/08/2008 12/08/2009	Penn National Penn National
<input type="checkbox"/>	General Liability - Property - Comm.				\$0.00 / \$0.00			
<input type="checkbox"/>	Umbrella - Comm.				\$0.00 / \$0.00			
<input type="checkbox"/>	Unassigned	Marketing Pending	New	Mary Oberleitner 12/02/2009	\$0.00 / \$0.00	12/08/2009 12/08/2010	12/08/2009 12/08/2010	Penn National Penn National
<input type="checkbox"/>	General Liability - Property - Comm.				\$0.00 / \$0.00			
<input checked="" type="checkbox"/>	Umbrella - Comm.				\$0.00 / \$0.00			

Client Name: Jackson's Signs

Branch: Training - Implementation Branch | Policy Term: 12/08/2009 12:01AM - 12/08/2010 12:01AM

Policy Type/Primary State: Monoline AL | Coverage Term: 12/08/2009 12:01AM - 12/08/2010 12:01AM

Issuing Co: Penn National | Stage: Policy

Billing Co: Penn National | Mode: Renew

Policy Number: Cpp-600000-1 | Status: Future Non-renewing

Policy Description: Small Business Policy | Origination Date: 12/08/2008

Actions:

Details	Topic	Type	Status	Memo
	Renewal	Annotation	Open	Umbrella policy for 2009-2010 term will renew as monoline.

Base Forms:

Forms	Description	Remove
Narrative ACORD 125	Underwriting Narrative Commercial Application 125	-

Line of Business:

Lines of Business	Form	Description	Remove
Umbrella - Commercial	ACORD 131	Commercial Umbrella Section 131	

Combining Monoline Policies into a Package Policy

In this example, the client has a monoline Property and Liability policy that will be a package at renewal. If at renewal, the carrier combines monoline policies together making a package policy, this is possible in Nexsure by doing the following:

Details	Line Of Business Policy Number Policy Type	Stage Status	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Billing Carrier Issuing Carrier	Remove
	Commercial Property (PROPC)	Policy In Force	New	Mary Oberleitner 05/19/2006	\$0.00 A \$0.00 A	05/22/2005 05/22/2006	05/22/2005 05/22/2006	Penn National	
	Process new marketing application.								
	General Liability (CGL)	Policy In Force	New	Mary Oberleitner 05/19/2006	\$0.00 A \$0.00 A	05/22/2005 05/22/2006	05/22/2005 05/22/2006	Penn National	
	Process new marketing application.								

1. After accessing the client, click the **SERVICING** link at the **Client** level and click the **Renewal** option.

This option is used to renew policies.

Enter a brief description of the renewal policy: [\[Next \]](#)
Note: This information will populate the action description field.

Enter additional notes to populate the action memo section: [\[Next \]](#)

Refresh from client profile

2. Enter a description for the action annotation to describe the renewal and click the **[Next]** link at the top right of the screen.



3. If necessary, select the expiring policy using the **[Show]** link to filter through a lengthy list of policies.

Client Name: International Food Services

Commercial Account

servicing

Page 1 of 1

Filters: [Show](#) [Back](#) [Next](#)

Select	Line Of Business Policy Number	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
<input type="radio"/>	General Liability - GL-200000	Policy In Force GL policy	New	Mary Oberleitner 12/03/2009	\$10,000.00 \$10,000.00	12/08/2008 12/08/2009	12/08/2008 12/08/2009	Penn National Penn National
<input type="radio"/>	Property - Comm- PR-30000	Policy In Force Comm'l property	New	Mary Oberleitner 12/03/2009	\$6,000.00 \$6,000.00	12/08/2008 12/08/2009	12/08/2008 12/08/2009	Penn National Penn National

4. Select one of the monoline policies to be renewed as a package policy in the **Select** column.

5. Click the **[Next]** link at the top right of the screen.

The expiring version of the policy is highlighted in yellow.

Client Name: International Food Services

Commercial Account

servicing

Renewal Policy Mode:

Page 1 of 1

Filters: [Show](#) [Back](#) [Next](#)

Select	Line Of Business Policy Number	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
<input type="checkbox"/>	General Liability - Commercial GL-200000	Policy In Force GL policy	New	Mary Oberleitner 12/03/2009	\$10,000.00 \$10,000.00	12/08/2008 12/08/2009	12/08/2008 12/08/2009	Penn National Penn National
<input type="checkbox"/>	Property - Commercial PR-30000	Policy In Force Comm'l property	New	Mary Oberleitner 12/03/2009	\$6,000.00 \$6,000.00	12/08/2008 12/08/2009	12/08/2008 12/08/2009	Penn National Penn National



6. Click the **[Show]** (this example displays the **[Hide]** link because the **[Show]** link was already clicked) and choose to **Include Marketing** policies from the **Policy Stage** list and click **Search** to return the results.

Client Name: International Food Services

Renewal Policy Mode: Renew

Search Filters:

Policy Number: Term Eff. Date (Fr): Term Eff. Date (To): Updated By:

Policy Modes: All Term Exp. Date (Fr): Term Exp. Date (To): LOB:

Policy Status: All Cvg. Eff. Date (Fr): Cvg. Eff. Date (To): Policy Stage: Include Marketing

Issuing Carrier: Cvg. Exp. Date (Fr): Cvg. Exp. Date (To): Include History: Marketing Only

Billing Carrier: Updated Date (Fr): Updated Date (To): Exclude Marketing

Sort Filters:

Sort Field 1: Line of Business Sort Order 1: Ascending Sort Field 2: Eff Date Sort Order 2: Ascending

Page 1 of 1

Select	Line Of Business	Policy Number	Stage Status	Description	Mode	Updated By	Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Issuing Carrier	Billing Carrier
<input checked="" type="checkbox"/>	General Liability - Commercial	GL-200000	Policy	In Force GL policy	New	Mary Oberleitner	12/03/2009	\$10,000.00 \$10,000.00	12/08/2008 12/08/2009	12/08/2008 12/08/2009	Penn National	Penn National
<input checked="" type="checkbox"/>	Property - Commercial	PR-30000	Policy	In Force Comm property	New	Mary Oberleitner	12/03/2009	\$6,000.00 \$6,000.00	12/08/2008 12/08/2009	12/08/2008 12/08/2009	Penn National	Penn National

7. Choose all policies to be included in the renewal by selecting the check boxes in the **Select** column. In this case, the carrier has advised the agency that the monoline property and liability policies will be combined in a package policy at renewal. Therefore, the property and liability policies are selected from the expiring policy list instead of marketing.

8. Click the **[Next]** link on the upper right corner.



The future policy is created and displayed.

Client Name: International Food Services

Branch: Training - Implementation Branch Policy Term: 12/08/2009 12:01AM
 12/08/2010 12:01AM

Policy Type/Primary State: Package AL Coverage Term: 12/08/2009 12:01AM
 12/08/2010 12:01AM

Issuing Co: Penn National Stage: Policy
 Billing Co: Penn National Mode: Renew

Policy Number: GL-200000 Status: Future Non-renewing

Policy Description: GL policy Origination Date: 12/08/2008

Actions: [Print](#) [History](#) [In Force](#) [Save Changes](#)

Details	Topic	Type	Status	Memo
	Renewal	Annotation	Open	Combining monoline policies to create a package policy.

Base Forms:

Forms	Description	Remove
Narrative	Underwriting Narrative	-
ACORD 125	Commercial Application 125	-

Line of Business:

Lines of Business	Form	Description	Remove
General Liability - Commercial	ACORD 126	Commercial General Liability Section 126	
Property - Commercial	ACORD 140	Commercial Property Section 140	

Step 5 – Updating the Future Policy

After the renewal is created (by following the above steps), the policy status displays as **Future**. Any changes necessary for the renewal policy may be made as long as the status is **Future**. To make sure the forms get updated with the correct carrier and dates, check the header and update for renewal. Clicking the **Save Changes** link on the **Navigation Toolbar** updates the forms with the new carrier and policy term. If **Save Changes** is not clicked, the forms will have the old policy header information. If the policy's **Mode Renew** when the **Issuing** or **Billing** carriers are changed and the **Save Changes** link is clicked, the policy mode will change to **Re-New-Co**. This mode indicates the policy is a renewal to the agency but new to the carrier. If the policy header is incorrect because of a data conversion or entry error, make sure to edit the carrier before invoicing or renewing the policy. Access the **assignment** tab to make sure the assignments are correct for the policy term and update the **policy info** tab with the renewal policy premiums, taxes, fees and commissions while the policy still has a **Future** status.



Step 6 – Placing the Future Policy in Force

To place the policy in force because the policy has been received or to bind coverage, follow the steps below:

1. Click the **In Force** link on the **Navigation Toolbar** on the **underwriting** tab.

2. If a binder is necessary, select the **Bound** option button and make sure to check the box beside **Click here to create a binder**.

The screenshot shows the Nexsure web interface for a client named 'Jackson's Signs'. The 'In Force' dialog box is open, allowing the user to select between 'In force' and 'Bound' options. A checkbox labeled 'Click here to create binder' is present next to the 'Bound' option. The 'Save' button is highlighted with a red arrow, indicating the next step in the process.

3. Click the **Save** button to change the status to **In Force**. However, if **Bound** is selected, the status will be **Bound**.

The policy now reflects an **In Force** status blocking any further modification without going through **Servicing**.

The screenshot shows the policy details page after the 'In Force' action. The status is now 'In Force' and the 'Click here to create binder' checkbox is checked. The 'Save' button is no longer visible, indicating the action has been completed.

Branch:	Atlantic Branch	Policy Term:	04/25/2006 12:01AM 04/25/2007 12:01AM
Policy Type:	Package	Coverage Term:	04/25/2006 12:01AM 04/25/2007 12:01AM
Issuing Co:	The Hartford Insurance Co.	Stage:	Policy
Billing Co:	The Hartford Insurance Co.	Mode:	Renew
Policy Number:	CPP-45678-01	Status:	In Force <input checked="" type="checkbox"/> Non-renewing



Step 7 – Send the Expired Policy to History

1. Return to the policy summary screen by clicking the **POLICIES** link on the **Client** menu. Notice that the expiring policy selected in the renewal process shows a status of **Renewed**. After the policy has been renewed the **Details**  icon shows as green indicating a renewed policy (For more on expired policies see *Tips and Facts Volume 2, Issue 7*).

Show/Hide	Policy Number	Policy Description	Policy Type	Line of Business	Policy Term	Status Mode	Annualized Premium	Estimated Premium	Billing Carrier	Issuing Carrier
	Cpp-600000-1	Small Business Policy	Package		12/08/2008 12/08/2009	Renewed New	\$0.00 D	\$10,500.00 D	Penn National	Penn National
Package Includes: General Liability - Commercial, Property - Commercial, Umbrella - Commercial										
	Cpp-600000-1	Small Business Policy	Package		12/08/2009 12/08/2010	Future Renew	\$0.00 A	\$8,000.00 A	Penn National	Penn National
Package Includes: General Liability - Commercial, Property - Commercial										
	Cpp-600000-1	Small Business Policy	Monoline	Umbrella - Commercial	12/08/2009 12/08/2010	Future Renew	\$0.00 D	\$0.00 D	Penn National	Penn National

2. Once the policy term is expired, the details icon turns red. Click the red **Details**  icon to send the expired policy to history.

Show/Hide	Policy Number	Policy Description	Policy Type	Line of Business	Policy Term	Status Mode	Annualized Premium	Estimated Premium	Billing Carrier	Issuing Carrier
	11152007	New Client Data Test	Package		11/15/2007 11/15/2008	In Force Renew	\$0.00 D	\$0.00 D	Fireman's Fund Ins. Co.	Fireman's Fund Ins. Co.
Package Includes: Auto - Commercial, General Liability - Commercial										



3. Click the **Cancel** button to prevent the policy status from changing to **Expired**.



4. Click the **History** link on the **Navigation Toolbar**.

Client Name: Jackson's Signs Commercial Account

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

Branch:	Atlantic Branch	Policy Term:	12:01AM 04/25/2005 CST 04/25/2006 12:01AM CST
Policy Type:	Package	Coverage Term:	12:01AM 04/25/2005 CST 04/25/2006 12:01AM CST
Issuing Co:	The Hartford Insurance Co	Stage:	Policy
Billing Co:	The Hartford Insurance Co	Mode:	New
Policy Number:	CPP-45678-01	Status:	Renewed <input type="checkbox"/> Non-renewing

navigation | instruction

- Underwriting
 - Base Requirements
 - Commercial Property
 - General Liability
 - Umbrella - Commercial

instruction | navigation

List | - | - | Print | **History** | In Force | Save Changes

5. Since the policy was renewed, select **Renewed** from the **Status** list. In the **Notes** box, enter the reason the policy is being sent to history. It is important to be specific so the record will be easy to locate in the years to come.

nexsure HOME | HELP | SETUP | LOGO

SEARCH | ORGANIZATION | REPORTS Bookmarks: Expand | Add | Remove Selected

CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | SERVICING | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG

Client Name: Jackson's Signs Commercial Account

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

Branch:	Atlantic Branch	Policy Term:	12:01AM 04/25/2005 CST 04/25/2006 12:01AM CST
Policy Type:	Package	Coverage Term:	12:01AM 04/25/2005 CST 04/25/2006 12:01AM CST
Issuing Co:	The Hartford Insurance Co	Stage:	Policy
Billing Co:	The Hartford Insurance Co	Mode:	New
Policy Number:	CPP-45678-01	Status:	Renewed <input type="checkbox"/> Non-renewing

navigation | instruction

- Underwriting
 - Base Requirements
 - Commercial Property
 - General Liability
 - Umbrella - Commercial

instruction | navigation

Actions:

Details	Topic	Type	Status
	Policy Edit	Annotation	Closed

Done

Base Forms:

Forms	Description	Remove
Narrative	Underwriting Narrative	-
ACORD 125	Commercial Application 125	-

Line of Business:

Lines of Business	Form	Description	Remove
Commercial Property	ACORD 140	Commercial Property Section 140	
General Liability	ACORD 126	Commercial General Liability Section 126	
Umbrella - Commercial	ACORD 131	Commercial Umbrella Section 131	

https://nexweb15.nexsure.com - Nexsure - Microsoft Internet Explorer

Status: Renewed

Notes:

Cancel Save



The policy is placed in history and the **underwriting** tab is displayed with a gray header which indicates a history record.

Client Name: Jackson's Signs

Branch: Atlantic Branch Policy Term: 04/25/2005 12:01AM CST
04/25/2006 12:01AM CST

Policy Type: Package Coverage Term: 04/25/2005 12:01AM CST
04/25/2006 12:01AM CST

Issuing Co: The Hartford Insurance Co Stage: Policy

Billing Co: The Hartford Insurance Co Mode: New

Policy Number: CPP-45678-01 Status: Renewed Non-renewing

Actions: Policy Edit Annotation Closed **Policy renewed with The Hartford for the 2006 term.**

Moving expired policies to history keeps the **In Force** policy list current and policy servicing for re-marketing, editing, audits, claims and creating letters without templates are all available for policies in history. The **HOME > EXPIRATIONS** screen is also kept up to date by removing the policy from the screen when policies are sent to history.

Note: Expired policies may also be sent to history from the **HOME > EXPIRATIONS** screen by using the context tools. Right-click on the red **Details** icon and left-click on **Send To History**.

International Food S...

- Open
- Market Existing
- Print
- Renew
- Send To History**
- Service



Step 8 – Send the Marketing Policies to History

After the policy has been successfully renewed, make sure to move the marketing policies to **History**. To do this, perform the following steps:

1. Click the **MARKETING** link on the **Client** menu to bring up the Marketing summary view. Right-click the **Details**  icon and left-click on **Send to History**.

	Marketing						
	Pending	New	Mary Oberleitner	\$6,692.00 A	04/25/2006	Auto Owners	
Open			04/21/2006		04/25/2007		
Market Existing	Property			\$3,125.00			
Print	ibility			\$2,567.00			
Rate	Commercial			\$1,000.00			
Re-rate	renewal with Auto Owners						
Send to History	Marketing		Mary Oberleitner	\$7,500.00 D	04/25/2006	The Hartford	

2. If sending the policy to history, on the **underwriting** tab, click the **History** link on the **Navigation Toolbar**.

underwriting	policy info	assignment	attachments	actions	qualification	history	transactions	claims	summary of it
Branch:	Atlantic Branch	Policy Term:				12:01AM			
						04/25/2006 CST			
						04/25/2007 12:01AM			
						CST			
Policy Type:	Monoline	Coverage Term:							
Issuing Co:	Auto Owners	Stage:				Marketing			
Billing Co:	Auto Owners	Mode:				New			
Policy Number:	Unassigned	Status:				Pending			
List	Rate	Bridge	Print	History	In Force	Save Changes			



3. In the **History** pop-up window, select a **Status**, **Reason** and in the **Notes** box enter a detailed description for the marketing submission so it will be easy to determine which carrier the policy was written for and why. The more information entered, the more clear it will be to understand the history record in the future.

The screenshot shows a web browser window with a pop-up dialog box. The pop-up has the following fields:

- Status: Declined By Client
- Reason: Annotation
- Notes: Policy renewed with The Hartford. Coverage and price on the 2006 Renewal.

Red arrows point from the text in the tip above to these fields in the pop-up. The background shows the main application interface with the 'history' tab selected.

The policy is placed in history and the **underwriting** tab is displayed with a gray header which indicates a history record.

Moving expired marketing submissions to history removes them from the marketing and **HOME > MARKETING** screens, keeping them current and up-to-date.

The screenshot shows the main application interface. The 'underwriting' tab is highlighted in gray. The 'Status' field is set to 'Declined By Client'. The 'Notes' field contains the text: 'Annotation - Policy renewed with The Hartford. Coverage and price on the'. Below the form, there are links for [template], [Import], [ACORD XML], [Supplements], and [Add Application].