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***** 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	c on t	the Detail	s 🍢 icon with	the blu	ie borde	er.				
expirations						_				_
All			~	A Showing F	age 2 of 2 🕨 🕅	2 🗸	Export Primary] [Export Result]	Filters: [Sho	w]
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Up Mode Upda	lated By ated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier	
		Jackson's Signs	(Commercial Lines)							^
P	20	Cpp-600000-1	Package General Liability - Cc	Policy In Force	New	Mary Oberleitn 12/02/2009	\$0.00 \$0.00	12/08/2008 12/08/2009	Penn National Penn National	
	<u>(4</u>	Process new marketi	ng application.							

Accessing the Client from the Search Screen

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

search												
All Branches				~								
											[Add	New Record]
Entity:	Client	~	SEARCH RESULT	- CLIENT								
Search Type:	Contains	*	1 Record(s) Foun			k	t et 👘 👘	Showing Page 1 of 1	▶ 14		Go T	o Page 🛛 💙
Client Stage:	All	~	Details	Name	Туре	Stage	Phone #	Location Name	City	St./Prov.	Zip/Postal	Remove
Client Type:	All	*		Jackson's Signs	с	С	(256) 237-1155	124 Denton Lane	Anniston	AL	36201	E.
Code Class:	All	~										
Code Designation:	All	*									Sear	ch Clear
Status:	All	*										
Client:	Jackson's											



T PROFILE OPPORTUNITIES MARKETING PO	REPORTS CAMPAIGNS ELINKS	Nook/market	
T PROFILE OPPORTUNITIES MARKETING PO		BOOKINAIKS: I	expano Add Kemové Selecte
	DLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRAI	NSACTIONS DELIVERY T-LOG	
Name: Jackson's Signs			Commercial Acce
ile profiling contacts locations named insur	reds related accounts assignments classified campaigns		
Jackson's Gions Information	Mailing Addrogr	Stick-e-Note [Add New]	
Website: www.xdti.com	Location Type: Office		
Primary Contact	Address: 124 Denton Lane	No Current Notes	
Name: Mr. Alan Howard	City: Anniston State/Province: AL		
Goes By: Alan	Zip/Postal: 36201		
Title: Owner	Country: United States		
E-Mail: maryo@xdti.com	International Info:		
Business Phone: (256) 237-1155 Business Fax: (256) 227-1156	Business Phone: (256) 237-1155 Fax Number: (256) 227-1156		
Tracker			
Date Created: 12/2/2009			
Client Since: 12/2/2009	Alerts		
Related Accounts: 0	Open Actions: 2	In Force	
		General Liability - Commercial	
		Property - Commercial	
Assignment information		E University Commercial	
		B oribreia - Commercial	
Primary Branch Depar	tment Unit Responsibility Name		

Step 2 – Servicing Screen

1. Click SERVI	1. Click SERVICING on the Client menu and select the Renewal option.										
nevsure											
SEARCH C	DRGANIZATION REPOR	TS CAMPAIGNS	LINKS					Воо	HOM kmarks: Expand	Add Remove Selected 🌾	
CLI INT PROFILE OPPORTUNITIES M/	ARKETING POLICIES	CLAIMS SERV	ICING ATTACHM	MENTS ACTI	IONS TRAN	SACTIONS	DELIVERY T-LOG			Commercial Account	
ser icing										Commercial Account	
Services This Marketing Market Analysis Einders Edit Endorsement Beneval Cancellation	option is used to renew	Enter addit	er a brief descriptic	on of the rene	wal policy: _{le} M on memo: R N	ewing 2008/0 ote: This infor Renewing 201 nonoline poli	09 Commercial Packag mation will populate the 08/09 Commercial Pac (cy this year. form prefills	e without the Ur action description ckage without the	mbrella. Umbrella i <i>field.</i> e Umbrella. Umbr	will be a monoline policy rella will be a	
Claim Audit	ect policy for renewal: Line O	Business	Stage Status Description	Mode	Update	l of 1 / M	Annualized \$	Policy	Coverage	Filters: [Show] [Next]	
New Certificate(s) Renewal Certificate(s)	 Genera CPP-4 	Liability - 5678-01	Policy In Force	Renew	Mary E Ob 02/16/	rleitner 011	\$0.00 \$0.00	04/25/2008 04/25/2009	04/25/2008 04/25/2009	Hartford Insurance Hartford Insurance	
y 10 yr 13											

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		}	🖣 Pagelofi 🕨			Filters:	[Show][Back][Next]
2. Locate a	nd sele	ct the expirir	ig policy in the	e Selec t	t column.			
nevsure							номе	HELP SETUP LOGOL
LIENT PROFILE OPPORTUNITI lient Name: Jackson's Sig	RCH ORGANIZA ES MARKETING JNS	TION REPORTS CAMPAIGN	5 ELINKS RVICING ATTACHMENTS ACT	IONS TRANSACTI	ONS DELIVERY T-LOG	Во	okmarks: Expand	Add Remove Selected Commercial Account
Services <u>Marketing</u> <u>Market Analysis</u> <u>Binders</u>	This option is	used to renew policies. Er Enter adı	iter a brief description of the rene ditional notes to populate the act	wal policy: rewing Note: 7 on memo: Renew mond	2008/09 Commercial Pack his information will populate t ing 2008/09 Commercial F ne policy this year.	age without the L he action descriptio Package without th	Imbrella. Umbrella n field. ne Umbrella. Umbre	will be a monoline policy
Edit Endorsement Renewal Cancellation	Select policy Search Filte	ior renewal:	И 4	Showing Page 1 of	fresh form prefills 1 ▷ ▷ 1 ♥	मिन	S	Filters: [Hide] [Next]
<u>Claim</u> <u>Audit</u> <u>New Certificate(s)</u> <u>Renewal Certificate(s)</u> Varification(s)	Policy M Policy M Policy St. Issuing Ca	de: All v tus: All v rier:	Term Err. Date (Fr): Cvg. Eff. Date (Fr): Cvg. Exp. Date (Fr):	Ter	m Err. Date (To):		LOB:	
Terring domay	Billing Ca Sort Filters Sort Fie	rier: d 1: Line Of Business 💌	Updated Date (Fr): Sort Order 1: Ascer	ding 🗸	pdated Date (To):		Sort Order 2: As	cending 💌 Search Clear
	Select	Line Of Business Policy Number General Liability - CPP-45678-01	Status Description Mode Policy In Force Renew	Updated By Updated Date Mary E Oberleitr 02/16/2011	Annualized § Billed Premium er \$0.00 \$0.00	Policy Term 04/25/2008 04/25/2009	Coverage Term 04/25/2008 04/25/2009	Issuing Carrier Billing Carrier Hartford Insuranc Hartford Insuranc
3. Click the	[Next] link on the	upper right s	ide of t	he 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.							1	
CLIENT PROFILE OPPORTUNITIE CLIENT PROFILE OPPORTUNITIE Client Name: Jackson's Sig	H ORGANIZATION R ES MARKETING PO JNS	EPORTS CAMPAIGNS EL LICIES CLAIMS SERVI	INKS CENG ATTACHMENTS	ACTIONS	TRANSACTIONS DEL	IVERY T-LOG	Book	HOME marks: Expand	HELP SETUP I Ac J Remove Select	LOGOUT ted 💞
Services Marketing	Renewal Policy Mode	: Renew 💌						Filters: [Show] [Back][Next	t]
Market Analysis Binders	Select	Line Of Business Policy Number	Stage Status Description Policy	N N Page	1 of 1 ▶ M Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Issuing Carrier Billing Carrier	
Edit Endorsement Renewal Cancellation Claim		Cpp-600000-1 General Liability - Property - Comm Umbrella - Comm	In Force Small Business Pc	New	Mary Oberleitner 12/02/2009	\$0.00 \$0.00 \$0.00 / \$0.00 \$0.00 / \$0.00 \$0.00 / \$0.00	12/08/2008 12/08/2009	12/08/2008 12/08/2009	Penn National Penn National	
Audit New Certificate(s) Renewal Certificate(s) Verification(s)										
2. Choose I Click the	Include M Search b	farketing outton to re	from the turn sea	e Poli rch re	cy Stage sults.	list.				
SEARCH CLIENT PROFILE OPPORTUNTT Client Name: Jackson's S	CH ORGANIZATION TES MARKETING P Signs	REPORTS OLICIES CLAIMS SER	VICING ATTACHME	NTS ACTIO	NS TRANSI CT DNS	HOME HELP marks: Expand Ad DELIVERY T-LOG COT	SETUP LO d Remove Se nmercial Acco	lect Dun		
Policy Status: All Issuing Carrier:	Cvg. Eff. Da Cvg. Exp. Da	te (Fr):	Cvg. Eff. Dat Cvg. Exp. Dat	e (To):		licy Stage: Include Include History: No	Marketing 💙	•		

6

Updated Date (To):

Sort Field 2: Eff Date

Sort Order 2: Ascendin

Updated Date (Fr):

Sort Order 1: Ascending

Billing Carrier:

Sort Field 1: Line of Business



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.

iexsure									HO	me Help Setup
SEARC	H ORGA	IZATION	REPORTS CAMPAIGNS	ELINKS				Boo	okmarks: Expand	Add Remove Sele
LIENT PROFILE OPPORTUNITI	ES MAI	KETING P	OLICIES CLAIMS SE	RVICING ATTACHME	NTS ACTIONS	TRANSACTIONS DELI	VERY T-LOG			
ent Name: Jackson's Sig	jns									Commercial A
ervicing										
Services	Reper	A Policy Mod	ie: Renew 🗸						Ciltara.	Funda 1 Frank Inter
Marketing	Searc	Filters							Filters	Save Filter Setting
Market Analysis	Polic	Number:		Term Eff. Date (Fr):		Term Eff. Date	(To):	0	Updated By:	
Binders	Po	icy Mode: A		Term Exp. Date (Fr);	6	Term Exp. Date	(To):		LOB:	
Edit	0-1			Cup 5% Data (5-)		Our ff Date	(T-)	177	Delley Change	Tankala Madatian - R
Endorsement	Pol	ry Status: 7		Cvg. Eff. Date (Fr):	1981	Cvg. Err. Date	(10):	1621	Policy Stage:	Include Marketing
<u>Renewal</u>	Issui	g Carrier:		Cvg. Exp. Date (Fr):		Cvg. Exp. Date	(To):	9	Include History:	No
Cancellation	Billi	g Carrier:		Updated Date (Fr):		Updated Date	(To):	9		
Claim	Sort F	lters					_			
Audit	S¢	rt Field 1: L	ine of Business 💌	Sort Order 1:	Ascending	Sort Fi	eld 2: Eff Date	~	Sort Order 2:	Ascending
New Certificate(s)					M.A. B. A	CA. N.N.				Search Clea
Renewal Certificate(s)				Stage	NN Page 1	of 1 P P				
Verification(s)	Sel	ect	Line Of Busines Policy Number	s Status Description	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
		۵	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
	0]	General Liability -				\$0.00 / \$0.00			
	0	1	Property - Comm				\$0.00 / \$0.00			
	0]	Umbrella - Comm				\$0.00 / \$0.00			
		۵	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
		1	General Liability -				\$0.00 / \$0.00			
		2	Property - Comm				\$0.00 / \$0.00			
		1	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.

nexsure						HOME HELP SETUP LOGOUT
SEARCH ORGAN	IZATION REPORTS CAMPAIGNS	ELINKS				Bookmarks: Expand Add Remove Selected 💞
CLIENT PROFILE OPPORTUNITIES MARK	KETING POLICIES CLAIMS S	ERVICING ATTACH	MENTS ACTIONS TR	ANSACTIONS DELIVERY	T-LOG	
Client Name: Jackson's Signs						Commercial Account
underwriting policy info assignment at	tachments actions qualification	history transactio	ns claims summary o	of insurance classifieds	delivery	
Branch:	Training - Implementation Branch	Policy Terr	m:	12/08/2009 12:0 12/08/2010 12:0	IAM	navigation instruction
Policy Type/Primary State:	Package AL 🗸	Coverage	Term:	12/08/2009 12:0 12/08/2010 12:0	1AM	Base Requirements
Issuing Co:	Penn National	\star > Stage:		Policy		General Liability - Commercial
Billing Co:	Penn National	💌 ➢ Mode:		Renew	~	Property - Commercial
Policy Number:	Cpp-600000-1	Status:		Future 🗌 Non-re	newing	instruction navigation
Policy Description:	Small Business Policy	Originatio	n Date:	12/08/2008		
List -	-	Print	History	In Force	Save Changes	

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.

nevsure		но	ME HELP SETUP LOGOUT
SEARCH	ORGANIZATION REPORTS CAMPAIGNS ELINKS	Bookmarks: Expand	Add Remove Selected 🖤
CLIENT PROFILE OPPORTUNITIE	5 MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRANSACT	IONS DELIVERY T-LOG	
Client Name: Jackson's Sig	15		Commercial Account
servicing			
Services	This option is used to renew policies.		[Next]
Marketing	· · · · · · · · · · · · · · · · · · ·		
Market Analysis	Enter a brief description of the renewal pointy.	Umbrella policy for 2009-2010 term will renew as monline.	
Binders	Enter additional potes to populate the action memo section:	Hele III - I - C - 2002 2010 L - III - III	
		Umbrella policy for 2009-2010 term will renew as monline.	
Edit	·		
Endorsement		Refresh from client profile	
Renewal			
Cancellation			
Claim			
Audit			
<u>New Certificate(s)</u>			
Renewal Certificate(s)			
Verification(s)			

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

nexsure								HOM	ie Help Setup	LOGOUT
SEARCH	ORGANIZATI	N REPORTS CAMPAIGNS	ELINKS				Boo	kmarks: Expand	Add Remove S	lected 🖤
CLIENT PROFILE OPPORTUNITIES	MARKETING	POLICIES CLAIMS S	ERVICING ATTACHM	ENTS ACTION	S TRANSACTIONS	DELIVERY T-LOG				
Client Name: Jackson's Sign	15								Commercial	Account
servicing										
Services <u>Marketing</u>				∦ 4 Pag	elofi ⊫∭			Filters: [Show] [Back][Ne	ext]
<u>Market Analysis</u> <u>Binders</u>	Select	Line Of Business Policy Number	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billed \$	Policy Term	Coverage Term	Issuing Carrier Billing Carrier	r
Edit	•	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	
Renewal										



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.

nevsure								нс	ome Help Setup	LOGOUT
SEARCH	ORGANIZATION	EPORTS CAMPAIGNS	ELINKS				Book	narks: Expand	Add Remove Se	acted 🖤
CLIENT PROFILE OPPORTUNITIES	S MARKETING P	ILICIES CLAIMS SER	VICING ATTACHMENT	S ACTIONS	TRANSACTIONS DEL	LIVERY T-LOG				
Client Name: Jackson's Sign	ns								Commercial	locount
servicing										
Services	Renewal Policy Mod	Renew 🗸						Filters	s: [Hide] [Back][N	ext1
Marketing	Search Filters								Save Filter Settings	
<u>Market Analysis</u>	Policy Number:		Term Eff. Date (Fr):	.0	Term Eff. Date	e (To):	•	Updated By:		
Binders	Policy Mode: 🛛	т.	erm Exp. Date (Fr):		Term Exp. Date	e (To):	•	LOB:		
Edit	Policy Status: A	×	Cvg. Eff. Date (Fr):		Cvg. Eff. Date	e (To):	0	Policy Stage:	Include Marketing	~
Endorsement	Issuing Carrier:		Dvg. Exp. Date (Fr):		Cvg. Exp. Date	e (To):	o In	lude History:	No	-
Renewal	Billing Carriers		Updated Data (Er)	200	Updated Date	a (Ta)				
Cancellation	Cash Filtras		opulated balls (in)r	(220)	oputto but	- (10)1	102.001			
Claim	Sort Field 1:	e of Business	Sort Order 1: A	cending	Sort F	Field 2: Eff Date	~	Sort Order 21	Ascending	
Audit				locitority		Li bute			Search Cle	ar
New Certificate(s)				N Page 1	of 1 🕨					_
<u>Renewal Certificate(s)</u>		Line Of Business	Stage Status		Updated By	Annualized \$	Policy	Coverage	Issuing Carrier	
Verification(s)	Select	Policy Number	Policy	Mode	Updated Date	Billed Premium	Term	Term	Billing Carrier	
	20	Cpp-600000-1	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	
	B	General Liability -				\$0.00 / \$0.00				
	B	Property - Comm				\$0.00 / \$0.00				
	٩	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	
		General Liability -				\$0.00 / \$0.00				
		Property - Comm				\$0.00 / \$0.00				
		Umbrella - Comm				\$0.00 / \$0.00				
	٩	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	
		General Liability -				\$0.00 / \$0.00				
		Property - Comm				\$0.00 / \$0.00				
		Umbrella - Comm				\$0.00 / \$0.00				

ne sure				
SEARCH ORGAI	NIZATION REPORTS CAMPAIGNS	ELINKS		Bookmarks: Expand Add Remove Selected 🌾
CLIENT PROFILE OPPORTUNITIES MAR	KETING POLICIES CLAIMS	SERVICING ATTACHMENTS ACTIONS	TRANSACTIONS DELIVERY T-LOG	
Client Name: Jackson's Signs				Commercial Account
underwriting policy info assignment a	ttachments actions qualification	history transactions claims summar	y of insurance classifieds delivery	
				navigation instruction
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	Base Requirements
Issuing Co:	Penn National	✓ >>> Stage:	Policy	🗄 Umbrella - Commercial
Billing Co:	Penn National	🗸 >> Mode:	Renew 💌	instruction navigation
Policy Number:	Cpp-600000-1	Status:	Future Non-renewing	
Policy Description:	Small Business Policy	Origination Date:	12/08/2008	
List -	-	Print History	In Force Save Changes	
Actions:				
Details Topic Type	Status	Memo		
Renewal Annotation	Open Umbrella policy	for 2009-2010 term will renew as monline.		
Base Forms:		[Imp	ort] [ACORD XML] [Supplements] [Add Applicatio	n]
Forms		Description	Remove	
Narrative		Underwriting Narrative		
ACORD 125		Commercial Application 125	-	
Line of Business:				
Lines of Business	Form	Descripti	on Remove	
🗓 Umbrella - Commercial	ACORD 131	Commercial Umbrell	a 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:

nexs	ure							Home Help	SETUP LOGOUT
	SEARCH	ORGANIZATION RE	PORTS				Bookmar	ks: Expand Add	Remove Selected
CLIENT PROP	FILE OPPORTUNITIES	MARKETING POL	ICIES CLAIMS	S SERVICING ATT	ACHMENTS ACTI	IONS TRAN	SACTIONS DI	ELIVERY T-LOG	
Client Na	me: International F	ood Services						► Comn	nercial Account
policies hi	story certificates bind	lers verifications	summary of insur	ance					
			li € s	howing Page 1 of 1 🕨	N 1 🕶			F	ilters: [Show]
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	E C
•	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	B
	Process new mail	keting application.							
						_			
1. Af	fter accessing	a the client	t. click t	he SERVIC	ING link				
at	the Client	evel and cl	ick the	Renewal or	tion				
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essu							Deel	HOME HE	LP SETUP LOGOUT
C IENT PROFILE	E OPPORTUNITIES MARKET	ING POLICIES CLAIM	S SERVICING A	TTACHMENTS ACTIONS	TRANSACTIONS DEL	IVERY T-LOG	воок	(marks: Expand Add	Remove Selected 🐝
Client Name:	International Food Serv	rices						• •	ommercial Account
servicing Se	micas								
Mar	rketing This option	is used to renew policies.	Entre a la						[Next]
Market	t Analysis		Enter a t	mer description of the renew	Note: This inf	onoline policies t formation will pope	to create a package ulate the action desci	e policy at renewal. ription field.	T
Bi	inders	Ent	er additional notes t	o populate the action memo	section: Combine Me	onoline policies t	o create a packag	e policy at renewal.	
	Edit								
Endo	orsement				✓ Refresh	n from client prof	ile		
Re	newal								
Canc	laim								
~									
A	Audit								
A <u>New Cer</u>	Audit rtificate(s)								
<u>New Cer</u>	Audit rtificate(s) Certificate(s)								
<u>New Cer</u> <u>Renewal C</u> <u>Verifi</u>	Audit rtificate(s) Certificate(s) ication(s)								
A <u>New Cer</u> <u>Renewal C</u> <u>Verifi</u>	vudit rtificate(s) Certificate(s) ication(s)								
A <u>New Cer</u> <u>Renewal C</u> <u>Verifi</u>	Audit trificate(s) Certificate(s) ication(s) nter a descr	iption for	the act	ion annotat	ion to d	escribe	the		
A <u>New Cer</u> <u>Renewal (</u> <u>Verifi</u> 2. E	Audit Artificate(s) Certificate(s) ication(s) Inter a descr enewal and c	iption for	the act	ion annotat	ion to de	escribe	the	_	



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

lame: Internationa	Food Servi	ces								Commercial A
Services Marketing					K 4 Pag	ge1of1 ▶)			Filters	Show] [Back][New
<u>Market Analysis</u> <u>Binders</u>	Select		Line Of Business Policy Number	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billed \$	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
<u>Edit</u>		۵	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
Renewal	0	20	Property - Comme PR-30000	Policy In Force Comml 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
Cancellation										
<u>Claim</u> Audit	-									
New Certificate(s)	1									
newal Certificate(s)	1									
Verification(s)]									
		-								
Select or	ne of th	ne m	ionoline p	olicies to l	be ren	ewed				
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The expiring version of the policy is highlighted in yellow.

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SEARCH	ORGANIZA	TION I	REPORTS CAMPAIGNS ELIN	s				Book	marks: Expand	Add Remove Selected 🖇		
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Client Name: International	lient Name: International Food Services Commercial Account											
servicing												
Services												
Marketing	Renewal Po	licy Mod	e: Renew 💙						Filters:	[Show] [Back][Next]		
Market Analysis				Stage	N Page 1	Lof1 ▶ N						
Binders	Select		Line Of Business Policy Number	Status Description	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Issuing Carrier Billing Carrier		
Edit		٩	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		
Renewal		٩	Property - Commercial PR-30000 C	Policy In Force omml 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		
Cancellation)											
Claim												
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New Certificate(s)												
Renewal Certificate(s)												
Verification(s)												



 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.

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CLIENT PROFILE OPPORTUNITI	ES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRANS	CTIONS DELIVERY T-LOG	
lient Name: Internationa	Food Services		Commercial Accourt
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Services			↓
Marketing	Renewal Policy Mode: Renew		Filters: [Hide] [Back][Next]
Market Analysis	Search Filters		Save Filter Setting
Binders	Policy Number:	Term Eff. Date (To):	Updated By:
Edit	Policy Mode: All V Term Exp. Date (Fr):	'erm Exp. Date (To):	LOB:
Endorsement	Policy Status: All 🗸 Cvg. Eff. Date (Fr):	Cvg. Eff. Date (To):	Policy Stage: Include Marketing
<u>Renewal</u>	Issuing Carrier: Cvg. Exp. Date (Fr):	Cvg. Exp. Date (To):	Include History: Marketing Only
Cancellation	Billing Carrier: Updated Date (Fr):	Updated Date (To):	Exclude Marketing
Claim	Sort Filters		
Audit	Sort Field 1: Line of Business 💌 Sort Order 1: Ascending 💟	Sort Field 2: Eff Date	Sort Order 2: Ascending
New Certificate(s)			Search Clear
Renewal Certificate(s)	Page 1 of 1		·
Verification(s)	Line Of Business Status U; Select Policy Number Description Mode Up	pdated By Annualized \$ F dated Date Billed Premium 1	Policy Coverage Issuing Carrier Term Term Billing Carrier
	General Liability - Commercial Policy Mar GL-200000 GL policy 1 Policy 1 Policy 1	ry Oberleitner \$10,000.00 12/ .2/03/2009 \$10,000.00 12/	08/2008 12/08/2008 Penn National 08/2009 12/08/2009 Penn National
	Property - Commercial Policy Mary PR-30000 In Force New 12, Commit property 12,	Oberleitner \$6,000.00 12/0 /03/2009 \$6,000.00 12/0	08/2008 12/08/2008 Penn National 08/2009 12/08/2009 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.

	SEARCH ORG	ANIZATION REPORTS CAMPAIC RKETING POLICIES CLAIMS	SNS ELINKS <mark>Servicing</mark> Attachments Actions	TRANSACTIONS DELIVERY T-	LOG	HOME HELP SETUP LOGOUT Bookmarks: Expand Add Remove Selected 🏈
ient Name: Inte	info assignment	Services attachments actions qualificati	ion history transactions claims summ	ary of insurance classifieds delive	ery	Commercial Account
Branch: Policy Type/Prima Issuing Co: Billing Co: Policy Number: Policy Description List Actions:	ry State:	Training - Implementation Bra Package AL V Penn National GL-20000 GL policy -	nch Policy Term: Coverage Term: >> Stage: >> Mode: Status: Origination Date: Print History	12/08/2009 12:01AM 12/08/2010 12:01AM 12/08/2010 12:01AM 12/08/2010 12:01AM Policy Renew V Future Non-renewing 12/08/2008 In Force Sa	ig ig ave Changes	Instruction Inderwriting Base Requirements General Liability - Commercial Property - Commercial Instruction navigation
Details Top Rene	c Type val Annotation	Status Open Combining n	Memo nonoline policies to create a package policy.	•		
Ease Forms:	Base Forms: [Import] [ACORD XML] [Supplements] [Add Applicati Base Forms Description Remove Narrative Underwriting Narrative - ACORD 125 Commercial Application 125 - Lines of Business : Unes of Business : Description Remove					
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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** is **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 Forc	e link on the Nav	igation Toolbar on	the underwriting tab.
2. If a binder is nece sure to check the	ssary, select the I box beside Click	Bound option buttor here to create a b	n and make binder .
SEARCH ORGANIZ CLIENT PROFILE OPPORTUNITIES MARKET Client Name: Jackson's Signs	N (ON REPORTS D G POLICIES CLAIMS SERVI	ING ATTACHMENTS ACTIONS TRAI	HOME HELP SETUP LOGOUT Bookmarks: Expand Add Remove Selected NSACTIONS DELIVERY T-LOC Commercial Account
underwinning policy into assignment attantic Branch Branch: Attantic Branch Policy Type: Package Issuing Co: The Hartford Inst Billing Co: The Hartford Inst Billing Co: The Hartford Inst Policy Number: CPP-45678-01 Lust - Actions: - Details Topic Type Status Base Forms: Narrative ACORD 125 Line of Business: Commercial Property ACORD : General Liability ACORD :	neents actions qualification his Policy Term: Coverage Term: r nce Cc V Stage: r nce Cc V Mode: Status: Print Histc ien In force Click here to create bin Click here to create bin 26 26 20 26 20 20 20 20 20 20 20 20 20 20	evy transactions claims summary of 04/25/2006 12:01AM 04/25/2007 12:01AM 04/25/2007 12:01AM 04/25/2007 12:01AM Policy Renew Future Non-renewing y In Force Cancel Save Cancel Save	Instruction Underwriting Base Requirements Commercial Property General Liability Instruction ravigation
3. Click the Save I However, if Boun	outton to change d was selected, tl	the status to In he status will be Bo r	Force. und.

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

Client Name: Jack	son's Signs fo assignment attachments	actions qualification	history transactions claims summary of in	Commercial Accounts
Branch:	Atlantic Branch	Policy Term:	04/25/2006 12:01AM 04/25/2007 12:01AM	navigation instruction
Policy Type:	Package	Coverage Term:	04/25/2006 12:01AM 04/25/2007 12:01AM	
Issuing Co:	The Hartford Insurance Co.	Stage:	Policy	Commercial Property General Liability
Billing Co:	The Hartford Insurance Co.	Mode:	Renew	instruction navigation
Policy Number:	CPP-45678-01	Status:	In Force Non- renewing	



Step 7 – Send the Expired Policy to History

 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*).

ne	SU	re							HOME HELP SETUP LOGOUT		
			SEARCH ORGANIZATION R	RTS CAMPAIGNS EL	INKS			Bookmarks: Exp	and Add Remove Selected 🐲		
CLIENT	ROFILE	OPPOR	TUNITIES MARKETING POL	ICIES CLAIMS SERVI	CING ATTACHMENTS	S ACTIONS TRA	NSACTIONS DELIVERY T-LOG				
Client	l ame:	Jackson	's Signs						Commercial Account		
policies	policies history certificates binders verifications summary of insurance										
A	luays Sho	w Active			I Showing	Page 1 of 1 🕨 🕅	1 🗸		[Expand All] Filters: [Show]		
Sho Hid		I	Policy Number Policy Description	Policy Type Line of Business	Policy Term	Status Mode	Annualized Premium Estimated Premium	Billing Carrier Issuing Carrier			
۲	• 9	🖗 sr	Cpp-600000-1 mall Business Policy	Package	12/08/2008 12/08/2009	Renewed New	\$0.00 D \$10,500.00 D	Penn National Penn National			
Pad	kage Incl	udes: Gene	eral Liability - Commercial, Prop	perty - Commercial, Umbre	ella - Commercial						
۲	🦻 🤹	🕅 Sr	Cpp-600000-1 mall Business Policy	Package	12/08/2009 12/08/2010	Future Renew	\$0.00 A \$8,000.00 A	Penn National Penn National			
Pad	kage Incl	udes: Gene	eral Liability - Commercial, Prop	perty - Commercial							
۲	> 9	🖗 sr	Cpp-600000-1 mall Business Policy U	Monoline Jmbrella - Commercial	12/08/2009 12/08/2010	Future Renew	\$0.00 D \$0.00 D	<u>Penn National</u> <u>Penn National</u>			

2. Once the policy term is expired, the details icon turns red. Click the red **Details** ticon 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	
*	Ø	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.	
Packag	e Includes:	Auto - Commercial, General Li	ability - Commercial					







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.





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

Branch: Atlantic Branch			Policy Term:	1 04/25/2005 04/25/2006 1	12:01AM CST 12:01AM	Dunderwriting		
Policy Type:	Packa	je		Coverage Term:	04/25/2005 04/25/2005 04/25/2006	2:01AM CST 12:01AM CST CST	Base Requirements Commercial Property General Liability Umbrella - Commercial	
Issuing Co:	The Hartford Insurance Cc		Stage:	Policy				
Billing Co:	The H	artford Insura	nce Cc 🔽	Mode: New			Instruction havigation	
Policy Number:	CPP-4	5678-01		Status:	Renewed renewing	Non-		
List	-	-	Print	Reinstate	Rewrite	In Force Save Changes		

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**.

- Þ	Internationa	l Food S
P	Open	4
	Market Existing	market
	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 M view. Righ	IARKETING link or t-click the Details	n the C	Client menu t on and left-c	o bring u lick on S	ip the Ma end to I	rketing sun History .	nmary			
Open Market Existing Print	- <mark>Marketing</mark> Pending Property vility	New	Mary Oberleitner 04/21/2006	\$6,692.00 A \$3,125.00 \$2,567.00	04/25/2006 04/25/2007	Auto Owners	E.			
Re-rate Send to History	Commercial 5 renewal with Auto Owners Marketing		Mary Oberleitner	\$1,000.00 \$7,500.00 D	04/25/2006	The Hartford	- F			
2. If sending click the H	 If sending the policy to history, on the underwriting tab, click the History link on the Navigation Toolbar. 									
underwriting policy i	nfo assignment attachm	ents ac	tions qualification	Y history Y	transactions	Claims Sumr	nary of it			
Branch: Policy Type:	Atlantic Branch Monoline		Policy Term: Coverage Terr	04 04	12 /25/2006 CS /25/2007 12 CS	::01AM FT (1) ::01AM FT (1)				

~

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Bridge

Stage:

Mode:

Status:

Print

Marketing

Pending

In Force

¥

Save Changes

New

History

Issuing Co:

Billing Co:

Policy Number:

Auto Owners

Auto Owners

Unassigned

Rate



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.

Branch: Atlantic Branch Policy Term: L12:01AN Policy Type: Package Policy Type: Package Issuing Co: Auto Owners Billing Co: Auto Owners Policy Number: Unassigned List Rate Bridg Attions: Policy renewed with The Hartford, Coverage and Auto Status Policy renewed with The Hartford, Coverage and Auto Auto Auto Auto Price On the 2006 Renewal.	ent Name: Jacks derwriting policy info	on's Signs	ents actions	qualification	history transact	ons clai	ns summary of ins	Vommercial Acco
Policy Type: Package Policy Type: Package Status: Declined By Client Status: Declined By Client Commercial Property Commerci	Branch:	Atlantic Branch	Poli	icy Term: /eb15.nex s u	re.com - Nexsure	12:01AN COST - Micros	-	navigation instruction
Issuing Co: Auto Owners Status: Declined By Client Instruction I	Policy Type:	Package			,		ne sure	
Dolicy Number: Unassigned Notes: Policy renewed with The Hartford. Coverage and price on the 2006 Renewal. List Rate Bridge Policy renewed with The Hartford. Coverage and price on the 2006 Renewal. Policy Renewal.	ssuing Co: Billing Co:	Auto Owners Auto Owners	Status: Reason:	Declined By Annotation	Client 🔽			instruction navigation
Jetails Topic Type Status	Policy Number: List ctions: Details Topic	Unassigned Rate Bridg	Notes:	Policy renew price on the	ved with The Hartf 2006 Renewal.	ord. Cove	rage and	

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.

Branch:	Atlantio	c Branch		Policy Term:	1 04/25/2006 04/25/2007 1	2:01AM ST 2:01AM	navigation instruction
Policy Type:	Packag	e		Coverage Term:	1 04/25/2006 C 04/25/2007 1 C	2:01AM SST .2:01AM	
Issuing Co:	Auto C)wners	\sim	Stage:	Marketing		
Billing Co:	Auto C)wners	~	Mode:	New		instruction havigatio
Policy Number:	Unassi	gned		Status:	Declined By	Client 🔽	
List	Rate	Bridge	Print	Reinstate	Rewrite	In Force C	Save Changes
actions:							
Details Topic	Type	Status		٩	1emo		