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Updating Policy Terms on Applications

To update the policy term dates on all the applications at once on a marketing or editable policy record, do the following:

1. Access the appropriate client through **SEARCH** on the **Primary** menu and click **MARKETING** on the **Client** menu.

The screenshot shows the Nexsure interface for Client Name: Busy Bee Crafts. A table lists policy records with columns: Details, Assign, Line of Business, Policy Number, Policy Description, Policy Type, Stage Status, Mode, Updated By, Updated Date, Estimated Premium, Policy Term, Billing Carrier, Issuing Carrier, and Remove. The first record is highlighted, and a red box around the 'Details' icon points to step 2.

Details	Assign	Line of Business	Policy Number	Policy Description	Policy Type	Stage Status	Mode	Updated By	Updated Date	Estimated Premium	Policy Term	Billing Carrier	Issuing Carrier	Remove
		Package	CPP-876650-1	General Liability - Commercial	Property - Commercial	Marketing Pending	New	Mary Oberleitner	05/16/2008	\$5,500.00 A	04/28/2006 04/28/2007	Atlantic Mutual	Atlantic Mutual	
No Message(s).														

2. Click the **Details** icon.

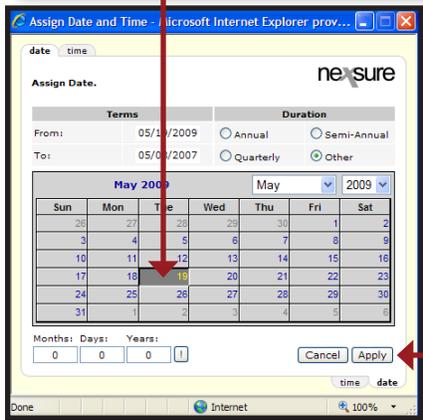
3. On the **underwriting** tab, click the **Policy Term Calendar** icon to change the date when necessary.

The screenshot shows the 'underwriting' tab for the policy record. It displays various fields such as Branch, Policy Type, Issuing Co, Billing Co, Policy Number, and Policy Description. A red box highlights the 'Policy Term Calendar' icon in the top right corner of the underwriting section.

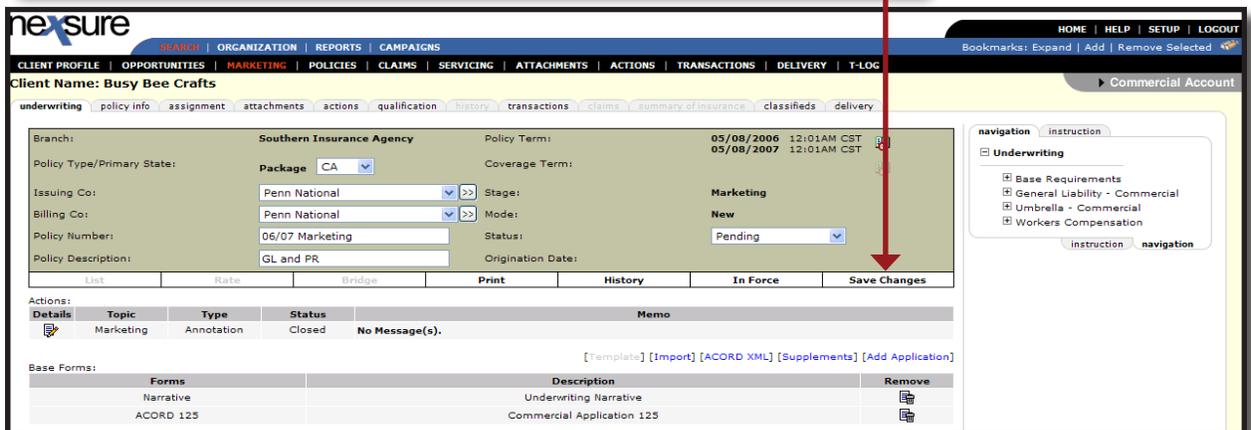
Branch: Southern Insurance Agency Policy Term: 05/08/2006 12:01AM CST
 Policy Type/Primary State: Package CA Coverage Term: 05/08/2007 12:01AM CST
 Issuing Co: Penn National Stage: Marketing
 Billing Co: Penn National Mode: New
 Policy Number: 06/07 Marketing Status: Pending
 Policy Description: GL and PR Origination Date:

Actions: Details, Topic, Type, Status, Memo
 Marketing Annotation Closed No Message(s).

4. On the **Assign Date and Time** dialog box, click a date in the calendar and click **Apply**.



5. Click **Save Changes** in the Navigation Toolbar to save the header and update the policy term dates on all applications to the dates entered on the header.



6. After clicking **Save Changes**, the policy term dates on all forms are updated as shown in this example.

The screenshot displays the Nexsure web application interface for a client named 'Busy Bee Crafts'. The 'SERVICING' tab is selected, showing a table of applications. The 'Proposed Effective Date' field is highlighted with a red arrow, indicating it has been updated to 5/19/2009. The 'Save Changes' button is visible in the top right corner of the application table.

List	Rate	Bridge	Print	Compare Policy: [On] [Off]	Save Changes																																																												
<table border="1"> <tr> <td>Status of Transaction:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Coverage Bound Date:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Coverage Bound Time:</td> <td>12:01</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>AM/PM:</td> <td>AM</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Proposed Effective Date:</td> <td>5/19/2009</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Carrier/Company Name:</td> <td>Utica National Insurance Group</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>NAIC Code:</td> <td>458925</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Underwriter:</td> <td>John Wright</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Underwriter Office:</td> <td>Orlando</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Policy Number:</td> <td>Unassigned</td> <td></td> <td></td> <td></td> <td></td> </tr> </table>						Status of Transaction:						Coverage Bound Date:						Coverage Bound Time:	12:01					AM/PM:	AM					Proposed Effective Date:	5/19/2009					Carrier/Company Name:	Utica National Insurance Group					NAIC Code:	458925					Underwriter:	John Wright					Underwriter Office:	Orlando					Policy Number:	Unassigned				
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Note: If **Market Existing** is selected on the **SERVICING** screen to copy the application and the policy term in the header does not need to be changed, only the applications need to be updated with the new policy term date. Click the **Save Changes** link on the Navigation Toolbar to update the policy term dates on all applications on the record.