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✗ HOME > EXPIRATIONS

HOME > EXPIRATIONS

There are two methods in Nexsure to look at expiring policies, the **HOME** > **EXPIRATIONS** screen and **REPORTS** on the **Primary** menu. The **HOME** > **EXPIRATIONS** is being addressed in this Tips & Facts.

Keeping track of expirations on a day to day basis, is best achieved by using the **HOME** > **EXPIRATIONS** screen. As policies are renewed or sent to history, the **HOME** > **EXPIRATIONS** screen automatically reflects the changes. Perform the following steps to keep track of expirations:

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4. When the Date Variable icon is clicked a dialog box displays to allow entry of the # of Days from the current date that the date should default to. To enter a prior date, type in a minus sign in front of the number. To enter a future date, type in a number without any mathematical symbol. Click Submit to continue.	4. When the Date Variable icon is clicked a dialog box displays to allow entry of the # of Da current date that the date should default to. To enter a prior date, type in a minus sign in front of To enter a future date, type in a number without any mathematical symbol. Click Submit to con	the number. the number. tinue.
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5. After entering the date variables, select the Save Filter Settings check box and click Search. This saves the changes made so the next time this user logs in, these will be their new default settings. Clicking Search saves the settings so that if a search is done it will change the default settings. To reset the default, change the settings and click Search to reset.



- 6. Since the expirations on this screen are workflow driven only those statuses used in the normal workflow are included. In order for any policies to appear on the HOME > EXPIRATIONS screen, the policy must be the current iteration on the CLIENT > POLICIES screen. The policy statuses returned on the HOME > EXPIRATIONS screen are as follows:
 - Bound Indicates that a policy is in a bound state, but not necessarily due to the policy being renewed. Binders are added for mid-term policy changes as well. This is why the Status of Bound is included.
 - Expired Indicates that a policy has been placed in an expired status by the user. (See *Tips & Facts Volume 2, Issue 7* in Nexsure Help for information about expired status.) Once work on the expired policy is completed, the user will send the policy to history. Doing this removes the expired policy from the HOME > EXPIRATIONS screen.
 - In Force Indicates that a policy is in force. As long as it is the current iteration of the policy and on the CLIENT > POLICIES screen, it can be found on the HOME > EXPIRATIONS screen.
 - Pending Cancellation Indicates that a policy may be about to cancel. Since the policy is not actually cancelled, it is desirable to still see it on the HOME > EXPIRATIONS screen. Once the Pending Cancellation is posted, the policy will no longer appear on the HOME > EXPIRATIONS screen. If the Pending Cancellation is aborted, the policy will appear on the HOME > EXPIRATIONS screen with a Status of In Force.
 - Received Indicates that the policy was received from a carrier download. Since these policies are active and still in force, they appear on the HOME > EXPIRATIONS screen until sent to history by the user.
 - Reinstated Indicates that a cancelled policy was reinstated. Since these policies are active and in force, they appear on the HOME > EXPIRATIONS screen until renewed or sent to history.
 - Rewritten Indicates that a cancelled policy was rewritten. Since these policies are active and in force, they appear on the HOME > EXPIRATIONS screen until renewed or sent to history.
 - Pending Nonrenewals Show only pending nonrenewals by selecting the Pending Nonrenewals only check box.

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- 7. The following statuses are omitted from the HOME > EXPIRATIONS screen:
 - Future Is omitted since this Status indicates that this policy is a renewal. Make sure to place future policies in force once the renewal updates are completed. Policies with a Status of Future can be found on the HOME > BINDER LOG with Bound/Future No Open binder selected in the View box which provides tracking of policies that still have a Status of Future.

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Pending - Is omitted to avoid duplicates on the screen.

Renewed - Is omitted since this status indicates the policy has already been renewed. This keeps the list current for servicing personnel so they know they no longer need to worry about whether the policy has been renewed or not.

- 8. The data returned on the **HOME** > **EXPIRATIONS** screen may be exported if security is granted. There are two ways to export the search results:
 - Export Primary Exports the search results on the HOME > EXPIRATIONS screen for the primary assignment added to the policy. If an assignment name is typed into the Search Filter's Assignment box, only policies where this assignment is added as the primary will export. If no assignment name is typed into the Search Filter's Assignment box, all policies will export with each primary assignment. This prevents duplicates from displaying on the Microsoft® Excel® spreadsheet.
 - Export Result Exports the search results on the HOME > EXPIRATIONS screen for all assignments added to the policy when no assignment name is included on the Search Filter's Assignment field.

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Fact: Restricted policies will only display on the **HOME** > **EXPIRATIONS** screen for staff members assigned to the restricted policy.

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