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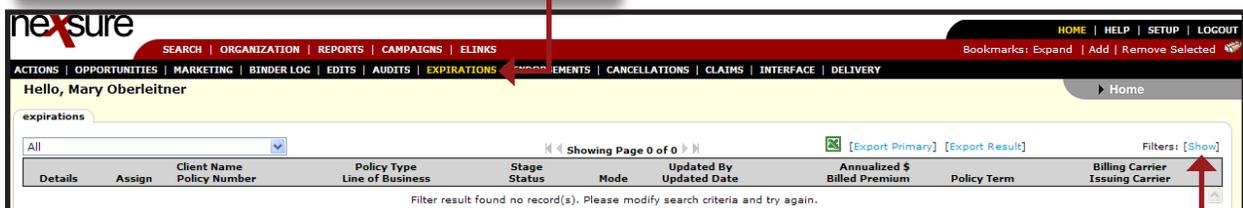
- ✘ HOME > EXPIRATIONS

HOME > EXPIRATIONS

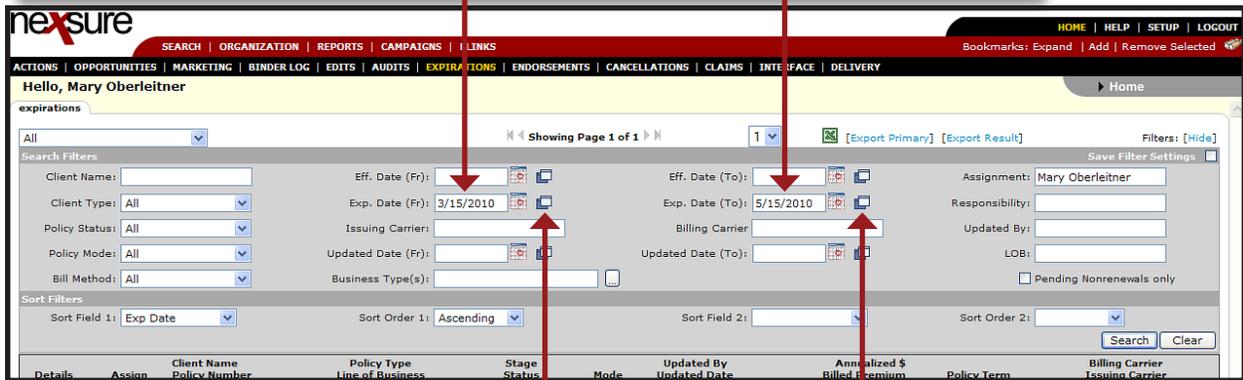
There are two methods in Nexsure to look at expiring policies, the **HOME > EXPIRATIONS** screen and **REPORTS** on the **Primary** menu. The **HOME > EXPIRATIONS** is being addressed in this Tips & Facts.

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:

1. On the **Home** menu, click the **EXPIRATIONS** link.



2. Click the **[Show]** link to reveal the default view which displays only the polices expiring that are assigned to the user that logged in 30 days prior and after the current date.



3. These dates can easily be changed for quick searches. To change the default for the dates, use the date variables to have the date range suit your needs each time the screen is displayed. To set date variables, click the **Date Variable** icon.

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.





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.



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**.

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
		Mason Crenshaw PKG-9898980980A88988	(Personal Lines) Package Auto - Personal (PAL)	Policy Future	Mary Oberleitn 04/15/2010	\$0.00 D \$0.00 D	04/14/2010 04/14/2011	Hartford Insurance G Hartford Insurance G

- **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.

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