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Cancellation Statuses

Cancellation Statuses

Setting up Cancellation Statuses

Identifying the reason that a policy is cancelled in Nexsure is done at the time the policy cancellation is posted. These statuses are setup as follows:

1. Click the SETUP lin	nk on the	Utility men	J.					1	
HOME HELP SETUP LOGOUT SEARCH ORGANIZATION REPORTS CAMPAIGNS ELINKS Bookmarks: Expand Add Remove Selected									
2. In the Setup Cons	ole , click	the Actions	link.						
	ORGANIZA	TION REPORTS	CAMPAIGNS ELINKS		Bookma	H(rks: Expan	DME HELP S d Add Remo	ETUP LOGOUT	
Use the navigation below to access Nexsure setup information Setup Console	actions	topics types p	lans						
Expand Minimize			Showing	page 1 of 18♥♥	Page 1 💙		Filter: [Show]	[Add New]	
Client Access	Details	Action Topic	Action Type	Due In	Status	Priority	Trigger	Remove	
Retail Agent Access Color Schemes	*	Activity	Legacy System	0 Day(s)	Closed	Normal	Add New	B	
Integration Downloads						plans	types topi	cs actions	
Lookup Management Opportunities									
 Lines of Business Programs 									
 Document Templates Security Administration 									

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Determine what statuses are needed and add them as Action Types. The following types (see table below) are in Nexsure and associated with the Topic of Cancellation when each new Nexsure organization is built. However, since some of these types can be modified they may not exist. Check the inactive list of types before adding new ones since these may be re-activated if necessary. It is important to note that types are not unique and may be reused with any topic. Make sure, when adding Action Types, not to repeat them since only one will be needed regardless of the number of topic associations.

Торіс	Туре	Edit/Remove Type Considerations	Action Default Days Due	Action Default Status	Action Default Priority	Topic Association Removable?
Cancellation	Annotation	Annotation is used when Servicing policy requires that an Action be added. Not recommended for modification.	7	Open	Normal	No
	Appointment	Appointment is used when moving Actions to Microsoft [®] Outlook [®] Calendar to identify scheduled items.	10	Open	Normal	Yes
	Cancelled By Agent	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed.	0	Closed	Normal	Yes
	Cancelled by Carrier	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed.	0	Closed	Normal	Yes
	Cancelled by Insured	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed.	0	Closed	Normal	Yes
	Check Status	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed.	15	Open	Normal	Yes
	Payment Received?	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed.	4	Open	High	Yes
	Received from Carrier?	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed.	27	Open	Normal	Yes
	T-filed	May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.	0	Closed	Normal	Yes

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3. After reviewing existing types and compiling the types that need to be added to your organization, click the **types** tab and the **[Add New]** link to add the new types. For more information on adding Action Types, see Chapter 4, *Admin Training Manual* in Nexsure Help under **Supporting Documents** > **Training Materials**.

SEARCH Use the navigation below to access Nexsure setup information. Setup Console	ORGANIZATION REP actions topics type Details Act Add	HOME HELP DRTS CAMPAIGNS ELINKS Bookmarks: Expand Add Rem Des plans Image: plans<	SETU LOCOUT ove { elected ** [Add New] te Remove
 Color Schemes Integration Downloads Lookup Management Opportunities Lines of Business Programs Document Templates Security Administration 	Image: Constraint of the constr	e: Jas Active V 7/29/200 General V 0/16/200 ription: Save Cancel V 0/16/200 0/16/200	
 In the Type box, entropy the Description and Associate the new 	nter the name o nd click Save to /ly added types	f the Action Type, select the Status , select the Icon , enter continue.	

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actions to	opics Y types Y plans Y	🛚 🖣 Showing	page 1 of 1 ▶)	Page 1 🗸		Filter: [Show]	[Add New]
Details	Action Topic	Action Type	Due In	Status	Priority	Trigger	Remove
_	Cancellation						
P		Annotation	1 Week(s)	Open	Normal	Service	B
P		Appointment	10 Day(s)	Open	Normal	Add New	E
P		Cancelled By Agent	0 Day(s)	Closed	Normal	Add New	E
P		Cancelled By Carrier	0 Day(s)	Closed	Normal	Add New	E
P		Cancelled By Insured	0 Day(s)	Closed	Normal	Add New	E
P		Check Status	15 Day(s)	Open	Normal	Add New	E
P		Payment received?	4 Day(s)	Open	High	Add New	B
P		Received from Carrier?	27 Day(s)	Open	Normal	Add New	E
*		T-filed	0 Day(s)	Closed	Normal	Add New	B



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- 9. On the New Actions dialog box, select as follows:
 - a. Select the Trigger of Add New.
 - b. Select the Topic of Cancellation.
 - c. Select the **Type** to associate with **Cancellation**.
 - d. Select the Due In of O day(s) if the action's Status is not to be set to Closed.
 - e. Select the Priority.
 - f. Select the **Status** of **Closed** if the action should not remain open when the cancellation is posted.
 - g. In the **Description** box, type in a description so it will be easy to identify the intention of the action's use (such as "Created for cancellation statuses").

New Actions	;	ne sure	
Trigger:	Add	New 🛛 Allow cancel/modify 🗹	
Topic:	Can	cellation	11111
Type:			
Due In:	0 da	y(s)	111
Priority:	Norr	nal 💽 🔶	[]
Status:	Clos	ed 💽 🗸	
Description:			
Alert?:			
Link		I	
action?:			
	_	Save Save & Add Cancel	
10. Once thes button. T click the S that anot	se ster his wi Save & her ac	os are completed, save the action. If only one action is being added, click Il save and close the New Actions dialog box. If another action is to b & Add button. This will save this action and display a New Actions dialoction can be added. Clicking Cancel will abort the addition of the action	the Save be added, og box so
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Using Cancellation Statuses

To use the Cancellation statuses, locate a pending cancellation from the Client's policies from either the **HOME** > **CANCELLATIONS** screen or from the **POLICIES** link located on the Client menu.

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II Branches			*							[Add Nev	v Record
ntity:	Client	SEAR	RCH RESULTS - CLIENT								
earch Type:	Contains	✓ 7 Rec	ord(s) Found		N.	Showing Pag	ge 1 of 1 🗼 🕅			Go To Pa	ge 1 🔻
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licy escription:			Policy Summary	c	с	(603) 878-1111	Office	New Ipswich	NH	03071	E.
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policies	history	certificates binders	verifications summary	ofinsurance					
Alwa	ays Show	Active		li	owing Page 1 of	1 🕨		[Expand A	ll] Filters: [Show]
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ی 🛛	• @	CPP-9088777	Package	03/09/2010 03/09/2011	In Force Renew	\$0.00 A \$11,350.00 A	<u>Hartford Insur</u> Hartford Fire Insu	rance Group rance Company	
Packa	ge Includ	les: General Liability - C	ommercial, Property - Co	mmercial					

3. On the **underwriting** tab, click **Post Cancellation** on the **Navigation Toolbar** to display the **Cancellation Status Selection** dialog box.

nexsure						HOME HELP SETUP LOGOUT
SEARC	H ORGANIZATIO	N REPORTS CAMPAIG	NS ELINKS			Bookmarks: Expand Add Remove Selected 🐗
CLIENT PROFILE OPPORTUNITI	ES MARKETING	POLICIES CLAIMS	SERVICING	АТТАСНМЕ	NTS ACTIONS TRAN	ISACTIONS DELIVERY T-LOG
Client Name: Lightship Tel	ecom, Inc.					Commercial Account
underwriting policy info assig	nment attachme	nts actions qualification	n history tr	ransactions	claims summary of i	nsurance classifieds delivery
Branch:	Ace Insurance B	ranch Policy Term		02/10/	/2010 12:01AM	navigation instruction
		· · · ·		02/10/	/2011 12:01AM	Underwriting
Policy Type/Primary State:	Monoline NH	Coverage T	erm:	02/10/ 09/13/	/2010 12:01AM /2010 12:01AM	Pending Cancellation
Billing Co: Hartford Lasualt		y Insurance Stage:		Renew		
Policy Number:	WC10412439157	Status:		Pendin	g Cancellation	Base Requirements Workers Compensation
Policy Description:	Exec Officers Ex	cluded Origination	Date: 🕂	02/10/	/2009	Cancellation(s)
List	Print	Abort Cancellation	Post Cancel	llation	Save Changes	instruction navigation
Actions:						
Details Topic Type	Status		Memo			
Cancellation Annotati	on Open Pro	cess cancellation.				
Cancellation:						
Form Description						
ACORD 35		Cancellation	Request/Policy F	Release 3	5	
		[Impor] [ACORD XML]	[Supplem	nents] [Add Application]	

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4. In the **Status** list, the **Cancellation Types** associated to the Topic of Cancellation are available for selection. After selecting the **Status**, enter a description in the **Notes** box giving the reason the policy is being cancelled and click **Save**.

		-		nevsure
Status:	Cancelled By Carrier	•		
Notes:	Payment received? Appointment Check Status Received from Carrier? T-filed Appotation			<
	Cancelled By Agent Cancelled By Carrier		Sa	ve Cancel
	Cancelled By Insured			

5. The policy's **underwriting** tab is displayed with a gray background since it is now located in history. The **Actions** on this **underwriting** tab reflect the status and note when posting the cancellation. It will have a status of either **Open** or **Closed** based on the action created in **SETUP**. If it was set to **Open** it will have a **Status** of **Open**, if set to **Closed** it will have a **Status** of **Closed**.

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			10							
underwriting policy into ass	ignment ttacr	nments actions qu	alification history	transactions c	laims summa	iry of insurance	classifieds delivery			
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Details Topic Type	e Status		1	1emo						
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