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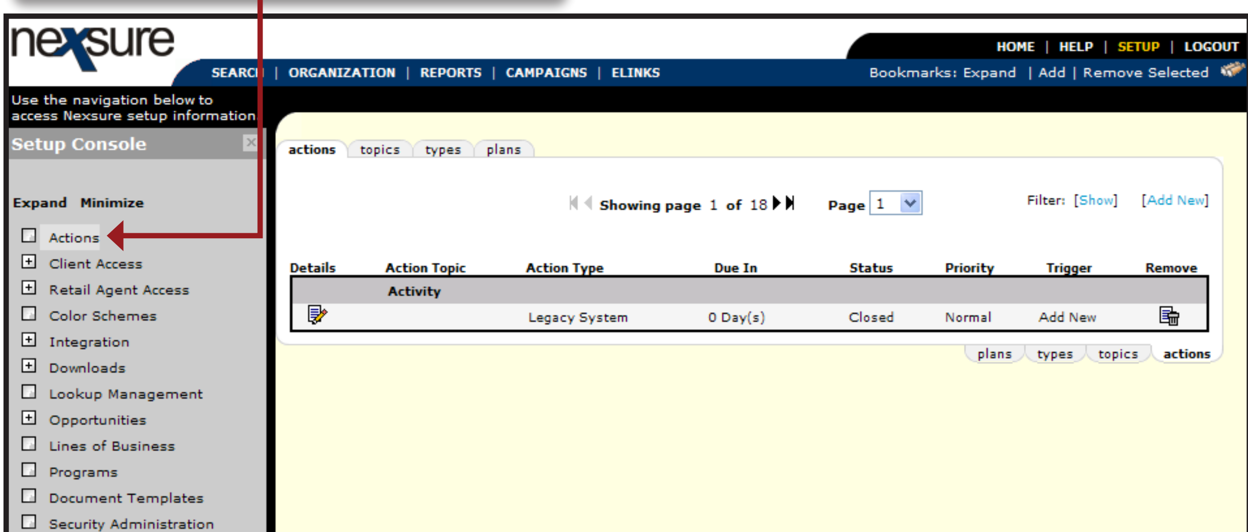
Cancellation Statuses

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** link on the **Utility** menu.

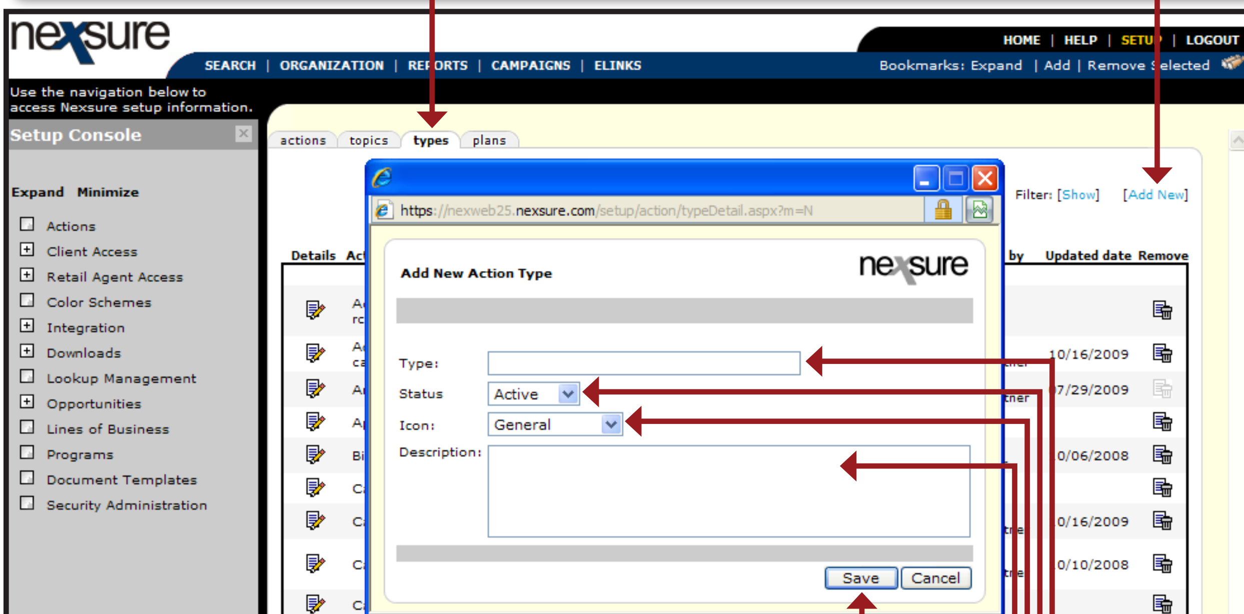
2. In the **Setup Console**, click the **Actions** link.



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.

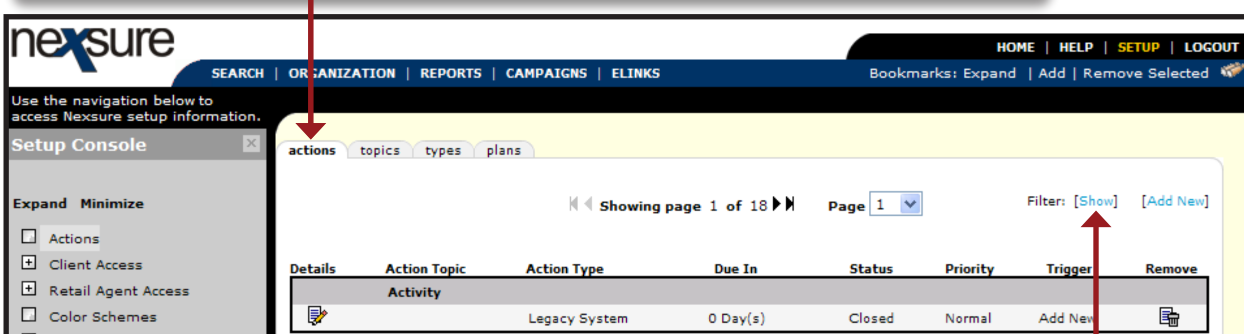
Topic	Type	Edit/Remove Type Considerations	Action Default Days Due	Action Default Status	Action Default Priority	Topic Association Removable?
Cancellation	Annotation	Annotation is used when Servicing policy requires that an Action be added. Not recommended for modification.	7	Open	Normal	No
	Appointment	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

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**.



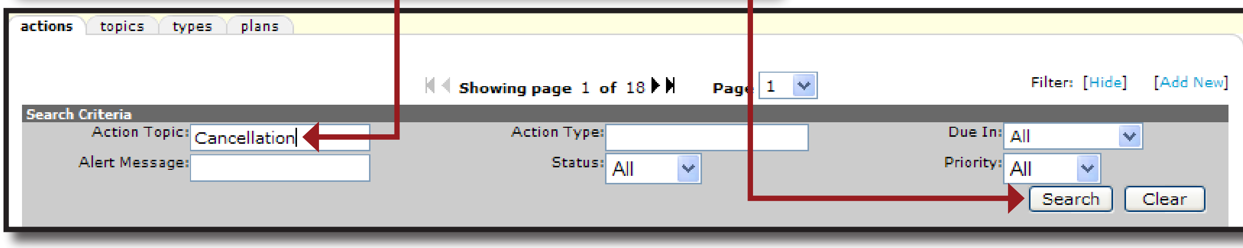
4. In the **Type** box, enter the name of the Action Type, select the **Status**, select the **Icon**, enter the **Description** and click **Save** to continue.

5. Associate the newly added types to the Topic of Cancellation by clicking the **actions** tab.

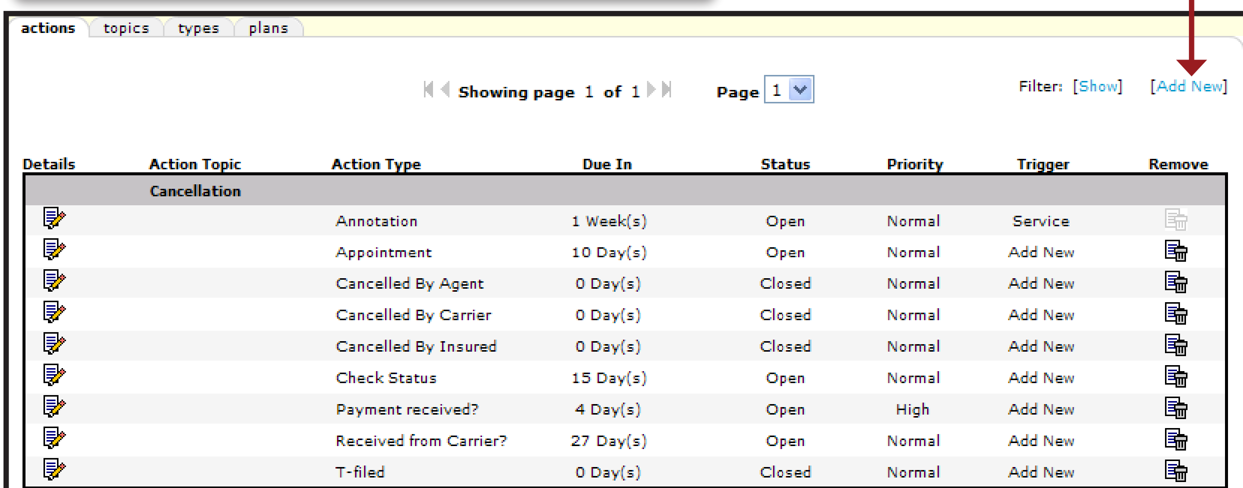


6. Locate the Topic of Cancellation by clicking the **[Show]** link.

7. In the **Action Topic** box, enter "**Cancellation**" and click **Search**.

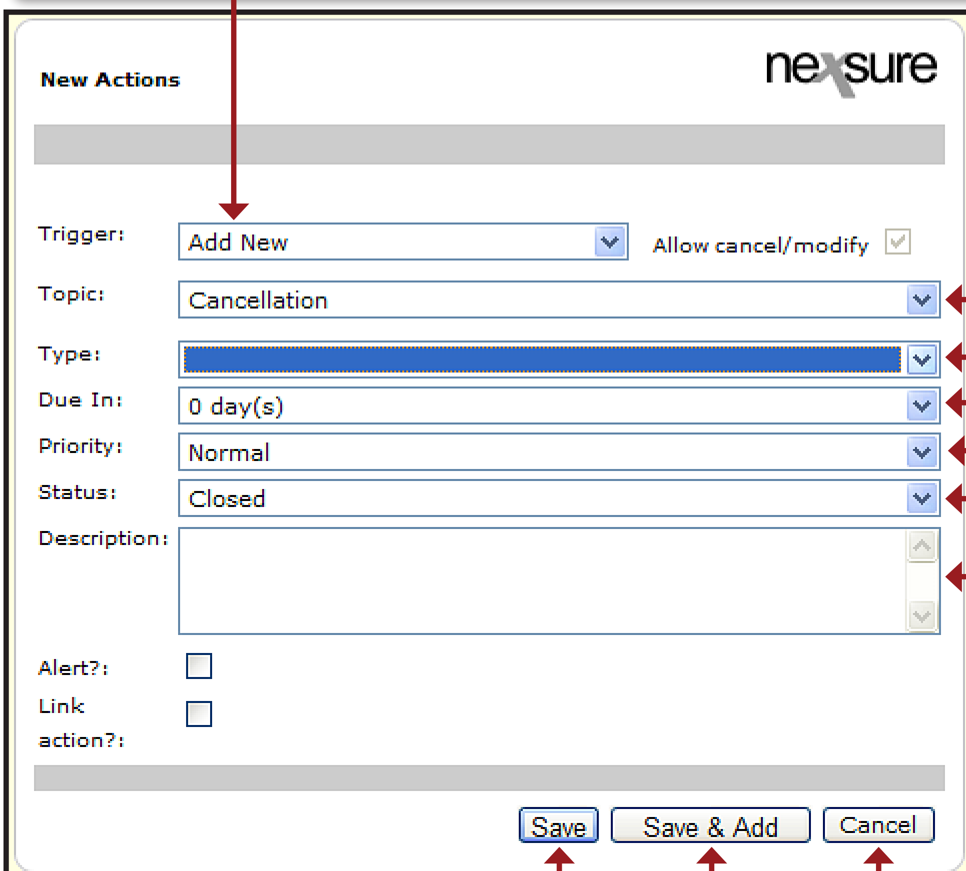


8. The **Action Topic** and all associated **Action Types** are displayed. Click the **[Add New]** link to add the action.



Details	Action Topic	Action Type	Due In	Status	Priority	Trigger	Remove
	Cancellation						
		Annotation	1 Week(s)	Open	Normal	Service	
		Appointment	10 Day(s)	Open	Normal	Add New	
		Cancelled By Agent	0 Day(s)	Closed	Normal	Add New	
		Cancelled By Carrier	0 Day(s)	Closed	Normal	Add New	
		Cancelled By Insured	0 Day(s)	Closed	Normal	Add New	
		Check Status	15 Day(s)	Open	Normal	Add New	
		Payment received?	4 Day(s)	Open	High	Add New	
		Received from Carrier?	27 Day(s)	Open	Normal	Add New	
		T-filed	0 Day(s)	Closed	Normal	Add New	

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 **0 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").



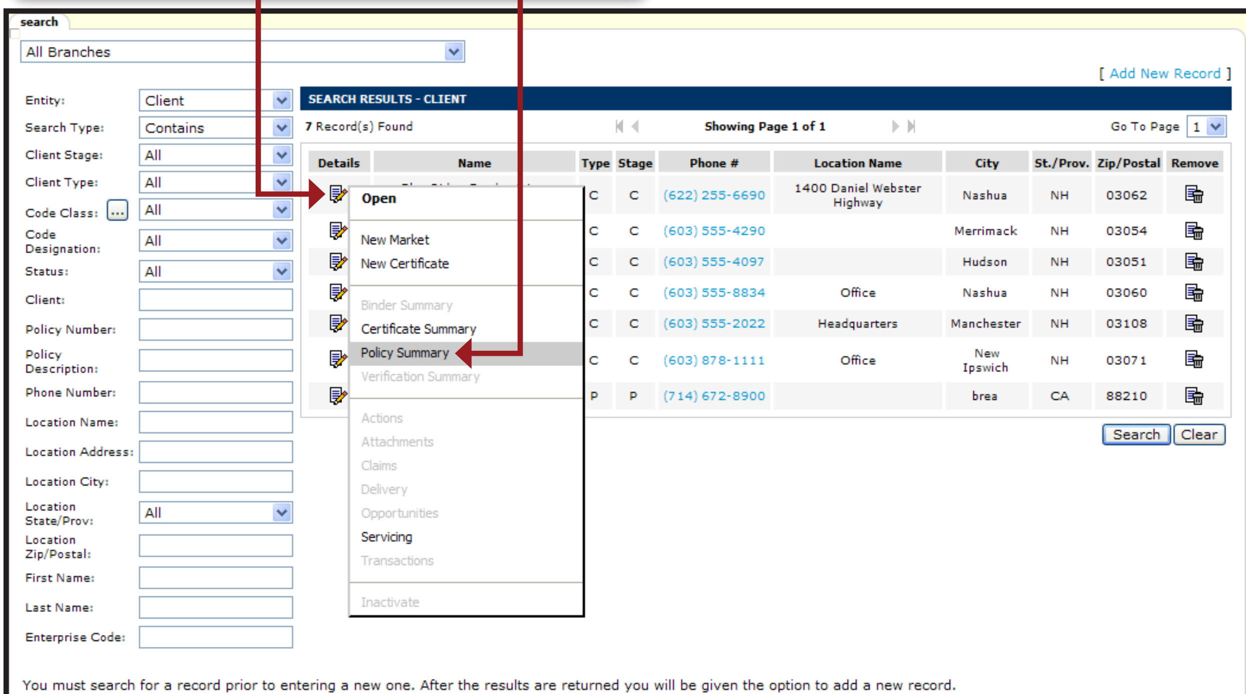
10. Once these steps are completed, save the action. If only one action is being added, click the **Save** button. This will save and close the **New Actions** dialog box. If another action is to be added, click the **Save & Add** button. This will save this action and display a **New Actions** dialog box so that another action can be added. Clicking **Cancel** will abort the addition of the action.

nexsure®
Tips & Facts
Volume 6, Issue 9

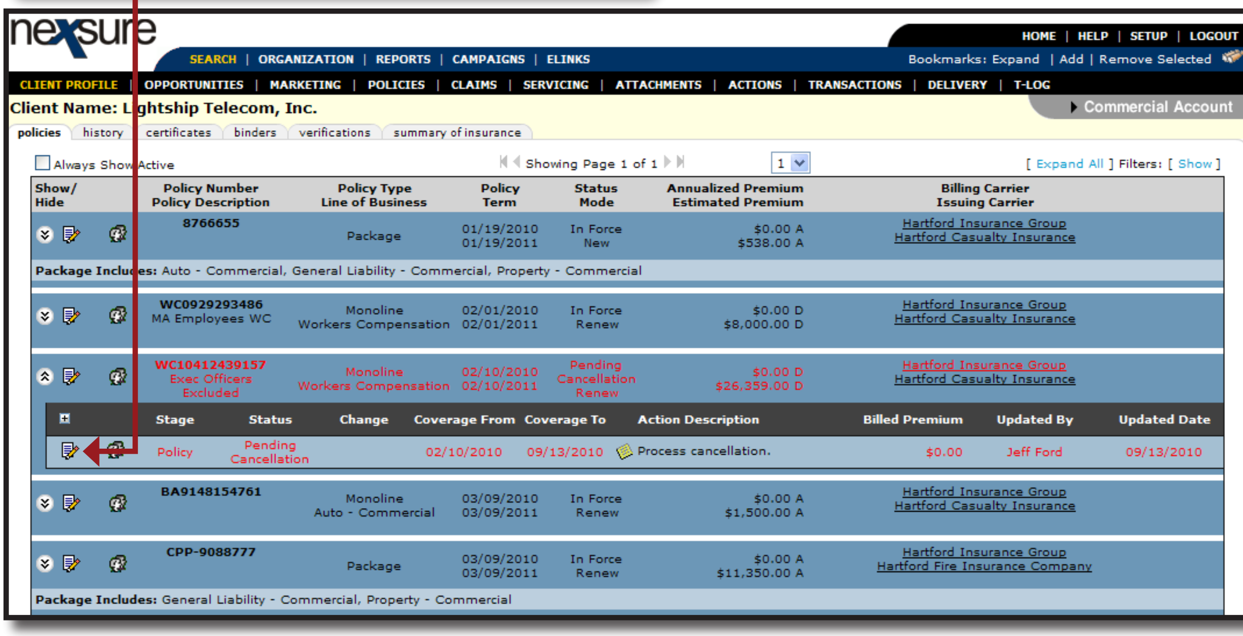
Using Cancellation Statuses

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.

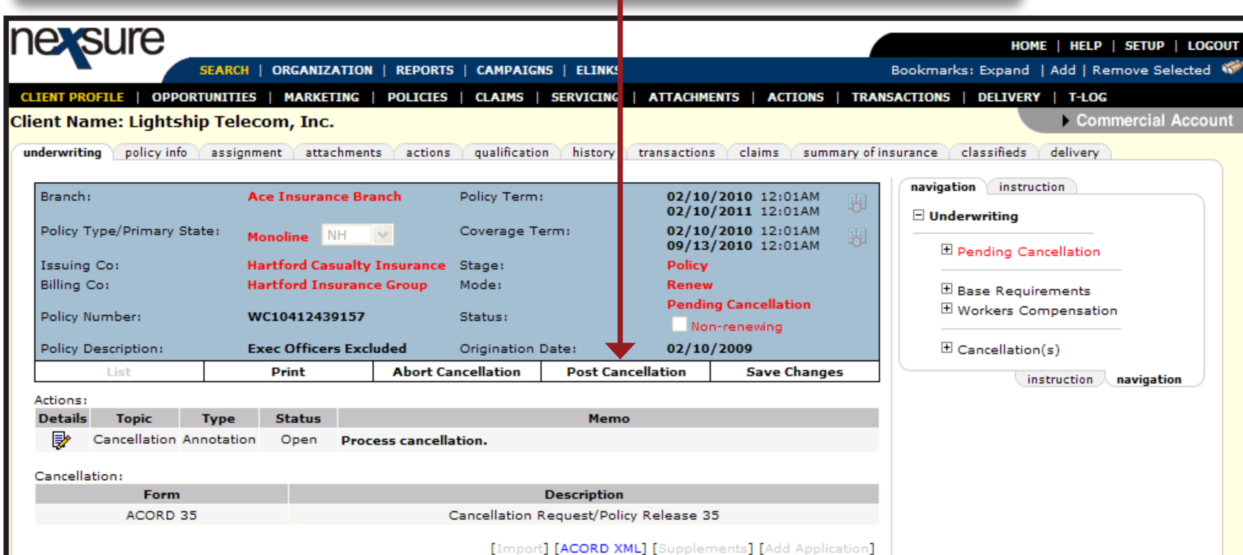
1. From the **Search** screen, right-click on the client's Details icon and select **Policy Summary**.



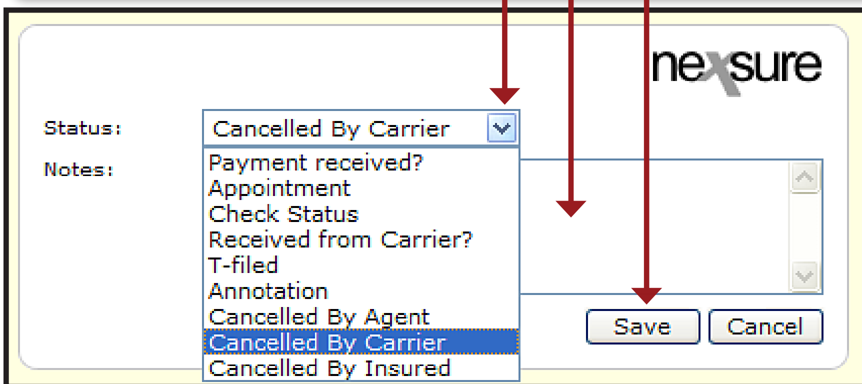
2. On the **Policy Summary** screen, click the client's **Details** icon to display the **underwriting** tab.



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



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**.



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**.