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Cancellation Statuses

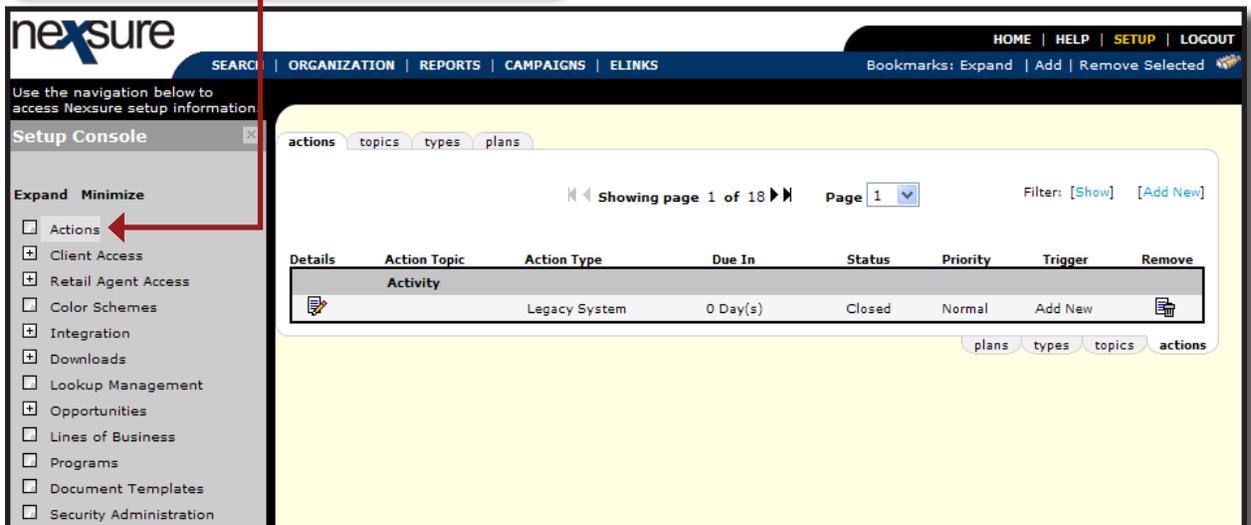
Setting up Cancellation Statuses

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



- 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**.

https://nexweb25.nexsure.com/setup/action/typeDetail.aspx?m=N

Add New Action Type

Type:

Status: **Active** ▼

Icon: **General** ▼

Description:

Save Cancel

- 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.

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

Showing page 1 of 18 Page 1 Filter: [Show] [Add New]

Details	Action Topic	Action Type	Due In	Status	Priority	Trigger	Remove
	Activity	Legacy System	0 Day(s)	Closed	Normal	Add New	

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



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

actions topics types plans

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Search Criteria

Action Topic: Cancellation Action Type: Due In: All

Alert Message: Status: All Priority: All

[Search] [Clear]

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

actions topics types plans

Showing page 1 of 1 Page 1 Filter: [Show] [Add New]

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").

New Actions

Trigger: Add New Allow cancel/modify

Topic: Cancellation

Type:

Due In: 0 day(s)

Priority: Normal

Status: Closed

Description:

Alert?:

Link action?:

Save
Save & Add
Cancel

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.



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**.

SEARCH RESULTS - CLIENT
7 Record(s) Found

Details	Name	Type	Stage	Phone #	Location Name	City	St./Prov.	Zip/Postal	Remove
Open		C	C	(622) 255-6690	1400 Daniel Webster Highway	Nashua	NH	03062	
New Market		C	C	(603) 555-4290		Merrimack	NH	03054	
New Certificate		C	C	(603) 555-4097		Hudson	NH	03051	
Binder Summary		C	C	(603) 555-8834	Office	Nashua	NH	03060	
Certificate Summary		C	C	(603) 555-2022	Headquarters	Manchester	NH	03108	
Policy Summary		C	C	(603) 878-1111	Office	New Ipswich	NH	03071	
Verification Summary		P	P	(714) 672-8900		brea	CA	88210	

You must search for a record prior to entering a new one. After the results are returned you will be given the option to add a new record.



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

Client Name: Lightship Telecom, Inc. Commercial Account

Show/Hide	Policy Number	Policy Description	Policy Type Line of Business	Policy Term	Status Mode	Annualized Premium Estimated Premium	Billing Carrier Issuing Carrier																		
	8766655		Package	01/19/2010 01/19/2011	In Force New	\$0.00 A \$538.00 A	Hartford Insurance Group Hartford Casualty Insurance																		
Package Includes: Auto - Commercial, General Liability - Commercial, Property - Commercial																									
	WC0929293486	MA Employees WC	Monoline Workers Compensation	02/01/2010 02/01/2011	In Force Renew	\$0.00 D \$8,000.00 D	Hartford Insurance Group Hartford Casualty Insurance																		
	WC10412439157	Exec Officers Excluded	Monoline Workers Compensation	02/10/2010 02/10/2011	Pending Cancellation Renew	\$0.00 D \$26,359.00 D	Hartford Insurance Group Hartford Casualty Insurance																		
<table border="1"> <thead> <tr> <th>Stage</th> <th>Status</th> <th>Change</th> <th>Coverage From</th> <th>Coverage To</th> <th>Action Description</th> <th>Billed Premium</th> <th>Updated By</th> <th>Updated Date</th> </tr> </thead> <tbody> <tr> <td>Policy</td> <td>Pending Cancellation</td> <td></td> <td>02/10/2010</td> <td>09/13/2010</td> <td>Process cancellation.</td> <td>\$0.00</td> <td>Jeff Ford</td> <td>09/13/2010</td> </tr> </tbody> </table>								Stage	Status	Change	Coverage From	Coverage To	Action Description	Billed Premium	Updated By	Updated Date	Policy	Pending Cancellation		02/10/2010	09/13/2010	Process cancellation.	\$0.00	Jeff Ford	09/13/2010
Stage	Status	Change	Coverage From	Coverage To	Action Description	Billed Premium	Updated By	Updated Date																	
Policy	Pending Cancellation		02/10/2010	09/13/2010	Process cancellation.	\$0.00	Jeff Ford	09/13/2010																	
	BA9148154761		Monoline Auto - Commercial	03/09/2010 03/09/2011	In Force Renew	\$0.00 A \$1,500.00 A	Hartford Insurance Group Hartford Casualty Insurance																		
	CPP-9088777		Package	03/09/2010 03/09/2011	In Force Renew	\$0.00 A \$11,350.00 A	Hartford Insurance Group Hartford Fire Insurance Company																		
Package Includes: General Liability - Commercial, Property - Commercial																									

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

Client Name: Lightship Telecom, Inc. Commercial Account

Branch: **Ace Insurance Branch** Policy Term: 02/10/2010 12:01AM
02/10/2011 12:01AM

Policy Type/Primary State: **Monoline NH** Coverage Term: 02/10/2010 12:01AM
09/13/2010 12:01AM

Issuing Co: **Hartford Casualty Insurance** Stage: **Policy Renew**

Billing Co: **Hartford Insurance Group** Mode: **Pending Cancellation**

Policy Number: **WC10412439157** Status: Non-renewing

Policy Description: **Exec Officers Excluded** Origination Date: **02/10/2009**

Actions: **Post Cancellation**

Navigation Toolbar: **Post Cancellation**

Cancellation Status Selection Dialog:

Form	Description
ACORD 35	Cancellation Request/Policy Release 35



- 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**.

Status: Cancelled By Carrier

Notes:

Save **Cancel**

- 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**.

Client Name: Lightship Telecom, Inc. **Commercial Account**

Branch: Ace Insurance Branch **Policy Term:** 02/10/2010 12:01AM - 02/10/2011 12:01AM

Policy Type/Primary State: Monoline NH **Coverage Term:** 02/10/2010 12:01AM - 09/13/2010 12:01AM

Issuing Co: Hartford Casualty Insurance **Stage:** Policy

Billing Co: Hartford Insurance Group **Mode:** Renew

Policy Number: WC10412439157 **Status:** Cancelled Non-renewing

Policy Description: Exec Officers Excluded **Origination Date:** 02/10/2009

Details	Topic	Type	Status	Memo
	Cancellation	Cancelled By Carrier	Closed	Payment not received

Base Forms:

Forms	Description	Remove
Narrative ACORD 125	Underwriting Narrative Commercial Application 125	-

Line of Business:

Lines of Business	Form	Description	Remove
Workers Compensation	ACORD 130	Workers Compensation Application 130	