



TIPS AND FACTS

Issue 10

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Adding/Editing/Printing and Delivering Auto ID Cards

Auto ID Cards can be created and issued for each vehicle listed on an application. The generic ACORD 50 will generate unless a state specific Auto ID form exists for the vehicle. A Fleet card can be generated for a commercial auto policy as well as adding an Auto ID Card for a vehicle not currently listed on the policy such as for policies that will be downloaded.

HOW to Add Auto ID Cards

1. Access the appropriate client through **Search** and click the **Servicing** link on the **Client menu**.

The screenshot shows the nexsure web application interface. The top navigation bar includes links for SEARCH, ORGANIZATION, REPORTS, CAMPAIGNS, ELINKS, HOME, HELP, SETUP, and LOGOUT. Below this is a secondary navigation bar with links for CLIENT PROFILE, OPPORTUNITIES, MARKETING, POLICIES, CLAIMS, SERVICING, ATTACHMENTS, ACTIONS, TRANSACTIONS, DELIVERY, and T-LOG. The main content area displays the client name 'Cathy's Crafty Corner' and a 'Commercial Account' label. On the left, there is a 'Services' menu with options like Marketing, Market Analysis, Binders, Edit, Endorsement, Renewal, Cancellation, Claim, Audit, New Certificate(s), Renewal Certificate(s), and Verification(s). The 'Verification(s)' link is highlighted in yellow. In the center, there is a table titled 'Select policy to create verification from:' with columns for Select, Line of Business, Policy Number, Policy Description, Stage Status, Policy Term, Coverage Term, and Billing Carrier Issuing Carrier. A single row is visible with the following data: Select (radio button), Auto - Commercial (CAUTO), Policy, In Force, 01/02/2009, 01/02/2010, 01/02/2009, 01/02/2010, Connecticut Mutua, Connecticut Mutua. A '[Next]' link is located at the end of the table row.

2. In the **Services** list, click the **Verification(s)** link and select the appropriate policy.

3. Click **[Next]**.



TIPS AND FACTS

The **Verification Policy Master** tab is displayed with all vehicles on the application.

The **policy number** and **Issuing Carrier** name along with the policy's **term** and **coverage dates** display in the header.

Nexsure generates the **Verification number** displayed in the header. This is used as a reference only.

Each vehicle will have its own **Details**  icon.

The **Reference** field is blank and can be used for internal notes for the master verification, it will not display on the Auto ID Card. After entering a reference, click the **Save Changes** link in the navigation toolbar under the verification header to save.

Note: The Line of Business application(s) must be filled out to populate to Auto ID Cards and other forms



TIPS AND FACTS

The **Year, Make, Model** and **Vin** number of each vehicle displays on the Verification summary below the header.

verification policy master

Number: 29 Effective Date: 04/06/2005
 Policy Number: BA1234567 Expiration Date: 04/06/2006
 Carrier Name: Sateco Ins of America Coverage Effective Date: 04/06/2005
 Reference: Coverage Expiration Date: 04/06/2006

Print Delete All Issue All Abort Save Changes

Verification Summary: [Add New]

Details	Year	Make	Model	VIN	Form	Insured	Active	Issued	Issue Date	Print	Remove
	2002	Ford	F150	1111111111111111	Insurance Identification Card 50	Cathy Smith	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
	2002	Ford	F150	2222222222222222	Insurance Identification Card 50	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
	2001	Ford	Econoline	333333333333	Insurance Identification Card 50	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
	2003	Ford	Econoline	44444444444444	Insurance Identification Card 50	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
	2002	Ford	F150	5555555555555555	Insurance Identification Card 50	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

verification policy master

summary of insurance verifications binders certificates history policies

The standard ACORD 50 will display in the **Form** drop-down box, unless a state specific form exists (see below).

There are four areas in Nexsure where the Auto ID form is determined, they are listed below:

1. The default State for each vehicle ID card should be the garaging address State listed on the application (If any).
2. If no garaging address exists, the default State will be the license/registration State of the vehicle (if any).
3. If no garaging address or license State exists the default State will be the applicants address State listed on the form.
4. If none of the above exist the default State will be the State the actual coverage form is from (ACORD 90CA = CA, etc).
 - ❑ The application State of the ACORD form. Until the ID card is issued, any available state may be selected.

Note: If a state specific Auto ID is created, the form will contain the information applicable to the state selected.



TIPS AND FACTS

- If the default **Form** in the drop-down box is not the desired option (see screenshot on page 4), select the appropriate form from the drop-down box. Remember that the state must be in the appropriate place on the Auto application to be available in the drop-down box. (Refer to state population rules above.)
- The **Insured** name drop-down box defaults to the Primary Named Insured, but the drop-down box will include all Name Insured's from the Client's named insured's tab and all drivers listed on the policy.
- If the **Insured** name for a vehicle is not the desired name, select the appropriate name from the drop-down box.

- The **Active** check box is checked by default. Removing the Active check from the Active check box removes that vehicle from the **Verification** tab **vehicles** default summary view. By default only those vehicles with an Active status display. Remove the Active flag if the client no longer owns the vehicle and the display is no longer necessary. Once cards are issued they may not be removed but removing the Active Flag will remove them from the default view.

- The **Issued** check box and **Issue Date** will remain blank until the Auto ID Card is issued. Once an Auto ID Card is issued; it cannot be removed or edited.

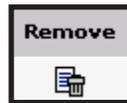


TIPS AND FACTS

- The **print** link is only active when the Auto ID Card is issued.



- The **Remove** icon will allow the selected Auto ID Card to be deleted until the Card has been issued.



- Click the **Save Changes** link in the navigation toolbar under the verification header to save any changes made.



Adding a Fleet Auto ID Card

A Fleet Auto ID Card can be created for a commercial policy or an Auto ID Card can be created for a vehicle not currently listed on the policy:

1. Click the **[Add New]** link to the right of the verification summary view.

Verification Summary:											[Add New]
Details	Year	Make	Model	VIN	Form	Insured	Active	Issued	Issue Date	Print	Remove



TIPS AND FACTS

The vehicle information pop-up window displays along with a **new auto verification line item** highlighted in yellow behind it.

2. Select the **FLEET** option.

Vehicle Information

FLEET

2002 Ford F150

2001 Ford Econoline

2003 Ford Econoline

2002 Ford F150

Buttons: Cancel, Manual Entry, Select

Details	Year	Make	Model	555
...				
	2002	Ford	F150	555
	2003	Ford	Econoline	44
	2001	Ford	Econoline	333333333333
	2002	Ford	F150	22222222222222
	2002	Ford	F150	1111111111111111

3. Click the **Select** button.

4. Click the **Ellipses** ... button to edit if necessary.

Details	Year	Make	Model	VIN	Form	Insured	Active	Issued	Issue Date	Print	Remove
...		FLEET	FLEET	FLEET	Insurance Identification Card 50 TX	Rugged Tires	<input checked="" type="checkbox"/>				

5. Be sure to click the **Save Changes** link to store the newly added Fleet card.



TIPS AND FACTS

Issuing Auto ID Cards

Issuing an Auto ID Card locks down all information contained in the Auto ID for the selected vehicle. The Auto ID form, the Named Insured and the information entered on each ACORD form cannot be edited after issuing.

To Issue an Auto ID Card for a Single Vehicle:

1. After accessing the appropriate client through **Search**, click the **Policies** link on the **Client menu**.
2. Click the **Verifications** tab, all Auto ID Cards that fall within the search filter criteria will be displayed.

The screenshot shows the Nexsure web application interface. At the top, there are navigation links: SEARCH, ORGANIZATION, and REPORTS. Below that, there are links for CLIENT PROFILE, OPPORTUNITIES, MARKETING, and POLICIES. The client name is Martin Ash. The current view is set to Vehicles. The table below shows a list of vehicles with columns for Select, Details, Year, Make, Model, Form Title, Named Insured, Reference, Active, Issued Issue Date, and Remove. A red arrow points to the 'Details' icon for the first row.

Select	Details	Year	Make	Model	Form Title	Named Insured	Reference	Active	Issued Issue Date	Remove
		83	Ford	Mustang	ACORD 30	Martin Ash				

3. The Current View in the drop-down box should display **Vehicles**.
4. Click the **Details** icon of the vehicle the Auto ID Card is to be issued for.



TIPS AND FACTS

5. If necessary, the data in the open Auto ID form beneath the header can be modified. The data pages can be navigated using the **Next** and **Prev** links or via the navigation tab on the right side of the window.

6. To view the Auto ID Form, click the **Preview** link.

The screenshot shows the Nexsure interface for a client named Martin Ash. The 'verification details' section is highlighted in a dark teal color. Below it is the 'Producer' form with fields for Name, Address, City, State, Zip, and Phone Number. A navigation sidebar on the right is also visible.

verification details	
Number: 163	Effective Date: 08/08/2005
Policy Number: Unassigned	Expiration Date: 08/08/2006
Carrier Name: AAA	Coverage Effective Date: 08/08/2005
Reference: <input type="text"/>	Coverage Expiration Date: 08/08/2006
Issued: <input type="checkbox"/>	
Preview Issue Abort Save Changes	

Producer	
Producer Name:	AAA Branch
Address - Street:	4479 Pontiac Lake Rd Ste 2
City:	Waterford
State/Province:	MI
Zip/Postal Code:	48328
Producer Phone Number:	(714) 672-8900

7. If any changes have been made, be sure to save them using the **Save Changes** link. Click **Issue** once all changes have been saved.

The verification header will display in a dark teal color, the Auto ID form will be locked down and cannot be edited.

- Click the **Verifications** tab to exit the Auto ID Card.
- Proceed to **Printing Auto ID Cards**.



TIPS AND FACTS

To Issue Auto ID Cards for All Vehicles:

1. After accessing the appropriate client through **Search**, click the **Policies** link on the **Client menu**.
2. Click the **Verifications** tab, all Auto ID Cards that fall within the search filter criteria will be displayed.

Client Name: Martin Ash

Current View: Verification Policy Masters

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Details	Policy Number	Carrier Name	Eff Date Exp Date	Cov Eff Date Cov Exp Date	Reference	Created By	Created On
	Unassigned	AAA	08/08/2005 08/08/2006	08/08/2005 08/08/2006		Rob Rohm	08/08/2005
	7549558524	AAA	08/08/2005 08/08/2006	08/08/2005 08/08/2006		Rob Rohm	08/08/2005
	7549558524	AAA	08/08/2005 08/08/2006	08/08/2005 08/08/2006		Rob Rohm	08/08/2005

3. The Current View in the drop-down box should display **Verification Policy Masters**.
4. Click the **Details** icon.

The Master Verification header is displayed in a light teal color with all autos that Auto ID Cards have been created for.



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Clicking the **Delete All** link in the navigation toolbar under the master verification header will delete all unissued Auto ID Cards. A confirmation pop-up window is displayed, click **OK** to delete all Auto ID Cards. Click **Cancel** to abort.

Details	Year	Make	Model	VIN	Form	Insured	Active	Issued	Issue Date	Print	Remove
	2002	Ford	F150	1111111111111111	Insurance Identification Card 50	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
	2002	Ford	F150	2222222222222222	Insurance Identification Card 50	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
	2001	Ford	Econoline	333333333333	Insurance Identification Card 50 NV	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
	2003	Ford	Econoline	44444444444444	Insurance Identification Card 50 NV	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
	2002	Ford	F150	5555555555555555	Insurance Identification Card 50	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

Clicking the **Abort** link in the navigation toolbar under the master verification header will delete the Master Verification record. A confirmation pop-up window will be displayed, click **OK** to delete the Master Verification record. Click **Cancel** to abort.

5. If necessary, make any changes and save them using the **Save Changes** link. Click the **Issue All** link.

6. A confirmation pop-up window displays, click **OK** to issue all verification records. Click **Cancel** to abort.





TIPS AND FACTS

The **Issued** check box will be checked and the **Issue Date** is displayed along with a printer icon.

verification policy master

Number: 40
Policy Number: BA1234567
Carrier Name: Safeco Ins of America
Reference:

Effective Date: 04/06/2005
Expiration Date: 04/06/2006
Coverage Effective Date: 04/06/2005
Coverage Expiration Date: 04/06/2006

Print Delete All Issue All Abort Save Changes

Verification Summary: [Add New]

Details	Year	Make	Model	VIN	Form	Insured	Active	Issued	Issue Date	Print	Remove
	2002	Ford	F150	5555555555555555	Insurance Identification Card 50	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05/02/2005		
	2003	Ford	Econoline	4444444444444444	Insurance Identification Card 50	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05/02/2005		
	2001	Ford	Econoline	333333333333	Insurance Identification Card 50	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05/02/2005		
	2002	Ford	F150	2222222222222222	Insurance Identification Card 50	Cathy's Crafty Corner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05/02/2005		
	2002	Ford	F150	1111111111111111	Insurance Identification Card 50	Cathy Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	05/02/2005		

verification policy master

The **Print** link under the master verification header will also now be active.



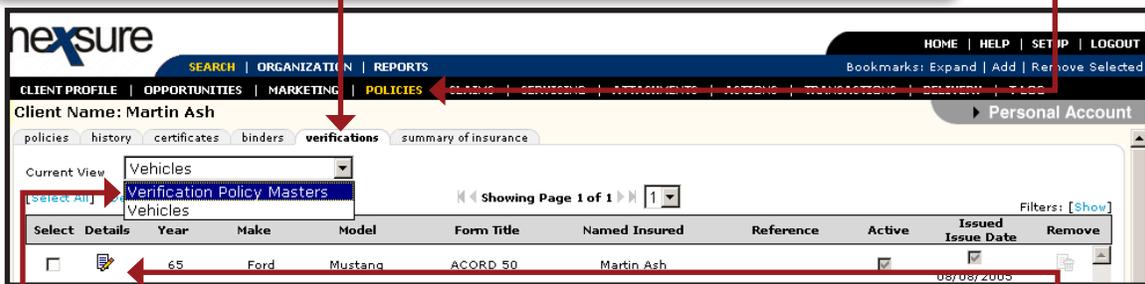
TIPS AND FACTS

Printing Auto ID Cards

Auto ID Cards can be printed by clicking the print link under the master verification header or in the verification tab summary view, when the Current View drop-down box displays **Vehicles**.

HOW to Print from the Master Verification

1. After accessing the appropriate client through **Search**, click the **Policies** link on the **Client menu**.
2. Click the **Verifications** tab, all Auto ID Cards that fall within the search filter criteria will be displayed.



Select	Details	Year	Make	Model	Form Title	Named Insured	Reference	Active	Issued Issue Date	Remove
<input type="checkbox"/>		65	Ford	Mustang	ACORD 50	Martin Ash		<input checked="" type="checkbox"/>	08/08/2005	

3. The Current View in the drop-down box should display **Verification Policy Masters**.
4. Click the **Details**  icon of the **master verification record** to display the master verification header and all Auto ID Cards added to that master policy verification record.



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5. Click the **Print** link in the navigation toolbar under the master verification header.

verification policy master

Number: 12
 Policy Number: 7549558324
 Carrier Name: AAA
 Reference:

Effective Date: 08/08/2005
 Expiration Date: 08/08/2006
 Coverage Effective Date: 08/08/2005
 Coverage Expiration Date: 08/08/2006

[Print](#) [Delete All](#) [Issue All](#) [Abort](#) [Save Changes](#)

Verification Summary:

Details	Year	Make	Model	VIN	Form	Insured	Active	Issued	Issue Date	Print	Remove
	65	Ford	Mustang	32344304343553	Insurance Identification Card 50	Martin Ash	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08/08/2005		
	66	Ford	Mustang	30434350434355	Insurance Identification Card 50	Martin Ash	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08/08/2005		

6. Click the **Select** check box to the left of the Auto ID Card you wish to print. The [\[Select All\]](#) and [\[De-select all\]](#) links can be used to select all Auto ID Cards to print or select none.

Verification Print Selection

Only issued verifications may be printed. Select verification(s) to print. When finished, click on [print] located at the bottom of the screen.

[\[Select All\]](#) [\[De-Select All\]](#)

Print	ID#	Year	Make	Model	VIN	Form	Insured	Active	Issue Date
<input checked="" type="checkbox"/>	163	65	Ford	Mustang	32344304343553	Insurance Identification Card 50	Martin Ash	<input checked="" type="checkbox"/>	08/08/2005
<input checked="" type="checkbox"/>	166	66	Ford	Mustang	30434350434355	Insurance Identification Card 50	Martin Ash	<input checked="" type="checkbox"/>	08/08/2005

Please select printer and number of copies below:

Printer:

Number of Copies:

[\[Cancel\]](#) [\[Print\]](#)

7. Select the **printer** and the **number of copies** needed from the drop-down boxes and click the [\[Print\]](#) link. The Auto ID Card will be sent to the printer selected. Click **Cancel** to abort.



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Batch Printing from the Verification Summary View

1. After accessing the appropriate client through **Search**, click the **Policies** link on the **Client menu**.

2. Click the **Verifications** tab.

The screenshot shows the Nexsure web application interface. At the top, there is a navigation bar with links for SEARCH, ORGANIZATION, and REPORTS. Below this, there is a client menu with links for CLIENT PROFILE, OPPORTUNITIES, MARKETING, POLICIES, CLAIMS, SERVICEING, ATTACHMENTS, ACTIONS, TRANSACTIONS, DELIVERY, and T-LOG. The client name is Martin Ash. The 'Verifications' tab is selected, and the 'current view' is set to 'Vehicles'. A table displays the following data:

Select	Details	Year	Make	Model	Form Title	Named Insured	Reference	Active	Issued Issue Date	Remove
<input checked="" type="checkbox"/>		65	Ford	Mustang	ACORD 50	Martin Ash		<input checked="" type="checkbox"/>	03/03/2008	

3. Select **Vehicle** from the current view drop-down box, all unissued and issued Auto ID Cards that fall within the search filter criteria are displayed.

4. Click the **Select** check box to the left of each issued Auto ID Card you wish to print. Click the **[Select All]** link to select all issued Auto ID Cards to print. Clicking the **[De-select All]** will remove the check from all selected Auto ID Cards.

5. Click the **Print Selected** link, a confirmation pop-up window displays. Click **OK** to create a new print batch. Click **Cancel** to abort.

6. Select the **printer** and the **number of copies** needed from the drop-down boxes and click the **[Print]** link, the Auto ID Cards will be sent to the printer selected. Click **Cancel** to abort.



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Delivering the Auto ID Card

Note: The default **[Show]** filter settings determine what is displayed in the summary view when clicking the **DELIVERY** link

1. Click the **Delivery** link on the **Client** menu.

2. Click the **[Add New]** link.

Auto ID Cards can be sent from Nexsure as an **e-mail** or **fax**. The **e-mail** tab will default, if faxing the Auto ID Cards click on the **fax** tab.

3. Complete the required e-mail or fax information on the left side of the screen.

4. The right side of the delivery screen is used to attach forms and documents to the e-mail or fax. Click the **Add** link in the gray verification line.



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The Attachment pop-up window **verification** tab will be displayed. All **master verification records** are displayed with the policy number, issuing carrier, policy and coverage term, reference, created by and creation date.

5. Click the appropriate **master verification record** to deliver.

Policy No	Carrier	Policy Term	Cov Term	Reference	Created By	Created
<input checked="" type="radio"/> 7549558524	AAA	08/08/2005 08/08/2006	08/08/2005 08/08/2006		Rob Rohm	08/08/2006
<input type="radio"/> 7549558955	AAA	08/08/2005 08/08/2006	08/08/2005 08/08/2006		Rob Rohm	08/08/2006

6. Click the **Next** link. All issued Auto ID Cards contained in the master verification record display.

7. To e-mail all Auto ID Cards, click the **check box** in the gray title bar to select them all. Check boxes can also be selected individually.

<input checked="" type="checkbox"/>	Year	Make	Model	VIN	Form	Active	Issued	Issue Da
<input checked="" type="checkbox"/>	65	Ford	Mustang	32344304343553	Insurance Identification Card 50	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08/08/2006
<input checked="" type="checkbox"/>	66	Ford	Mustang	30434350434355	Insurance Identification Card 50	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08/08/2006

8. Click the **Attach** button. Clicking **Cancel** will abort the addition of the attachment.



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The attachment(s) will display with the total number of items attached on the right side of the delivery screen.

E-Mail Information

Title: Auto ID Form *

From: Rob Rohm *

From Email Address: rob.rohm@xdti.com *

To: Martin Ash *

To Email Address: martin.ash@martinash.com *

CC: *

BCC: *

Regarding: Auto ID *

Message: Dear Martin, Attached you will find the Auto ID you requested. *

[\[Close\]](#) [\[Send\]](#)

Policies	Add			
Claims	Add			
Cancellations	Add			
Certificates	Add			
Verification	Add			
PolicyNo	Form	Year	Make	Model
Unassigned	Insurance Identification Card 50	65	Ford	Mustang
Binders	Add			
Others	Add			
Total Attachments: 1				

9. Click the **Send** link to send the e-mail or fax.

The Delivery summary view screen is displayed with the status of the e-mail or fax. The stage will update as the screen is refreshed.

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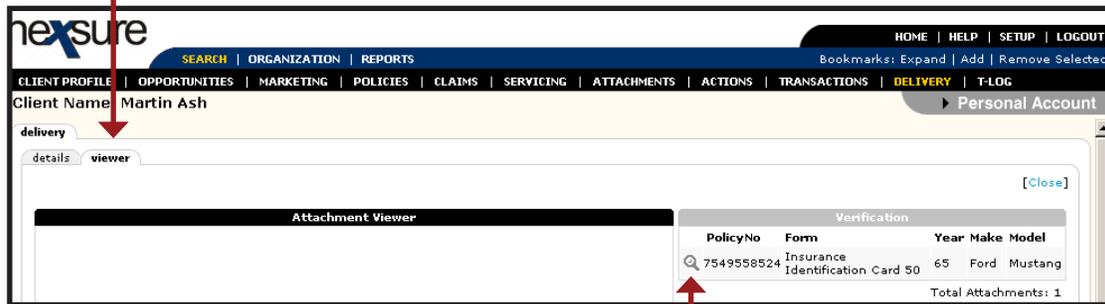
	From Name From Email	To Name Client Name	Title Regarding	Sent To	Status Message	Date Time	Via
	1 Rob Rohm rob.rohm@xdti.com	Martin Ash Martin Ash	Auto ID Form Auto ID	martin.ash@martinash.com	Successful Email sent	8/10/2005 10:35:44 AM	Email
	1 Rob Rohm rob.rohm@xdti.com	Martin Ash Martin Ash	Auto ID Form Auto ID	martin.ash@martinash.com	Pending	8/10/2005 10:37:59 AM	Email

10. Each delivery will have its own **Details** icon. Click the **Details** icon to display the e-mail or fax information, the forms included, and the total number of attachments.



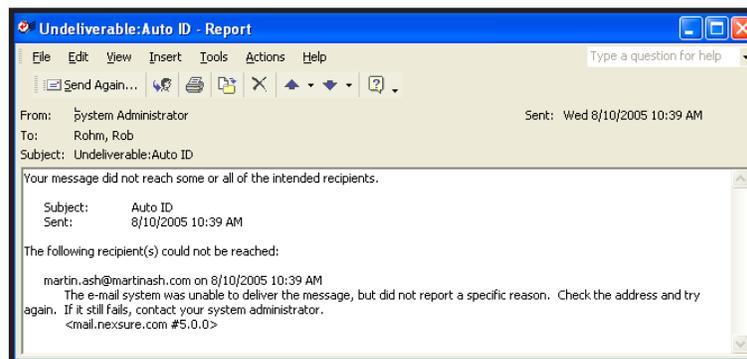
TIPS AND FACTS

11. Click the **Viewer** tab.



12. Each form included in the e-mail or fax is displayed with a **Magnifying Glass** icon. Click the **Magnifying Glass** icon to view the information that was sent.

If the e-mail is unsuccessful, the sender will receive an **unsuccessful e-mail** message in their outlook mailbox.



Note: The **Delivery Summary** screen (shown on Page 19) can be accessed from the **Home** menu, or the **Client** menu. The **Home** menu will display a summary of all deliveries sent by the user. The client level will only display deliveries for the specified client.



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Adding Authorizations and Requirements to Issue New York Auto ID Cards

To issue Auto ID Cards in New York, the New York DMV requires a license key and Insurance license number. This information must be entered into Nexsure for each Branch issuing New York Auto ID Cards from Nexsure. To setup, go through the following steps:

1. Click the **Organization** link on the **Primary** menu.

2. Click the **Branches** tab.

Details	Branches	Address	City	St./Prov.	Zip/Postal	Remove
	AAA Branch (1)	4479 Pontiac Lake Rd Ste 2	Waterford	IA	48328	
	BBB Branch (2)	222 Second Street	Brea	CA	92821	
	CCC Branch (3)	333 Third Street	Whittier	CA	90602	
	DDD Branch (4)	444 E. Fourth Street	La Habra	CA	90631	

3. Click the **Details** icon beside the Branch name.

4. Click the **Authorizations** tab.

DMV Authorizations

No record found. Click [here](#) to add a record

5. To add Authorizations, click the **Add New** link located on the navigation toolbar to display the Add New Authorization screen.



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6. Type in the **SID/DMV License Key**, **Insurance License No** and any **Notes** if desired.

7. Click the **Save** button to store data or **Cancel** to abort.

In addition to completing the required Authorizations for each branch, complete the client's **named insureds** tab, select the correct issuing carrier on the **underwriting** tab, assign the correct primary branch to the policy and complete the ACORD Auto application. Areas where shortcuts are sometimes taken must be avoided. The following areas must be completed correctly in order to generate a valid NY auto ID card:

8. Enter the correct issuer name and address in Nexsure under the branch by clicking the **ORGANIZATION** link on the **Primary** menu, locate the branch by clicking the **branches** tab and click the **Details**  icon.

Details	Branches	Address	City	St./Prov.	Zip/Postal	Remove
	Nexsure New User Training Branch (1)	145 S. State College Blvd	Brea	CA	92821	



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Note: The NY DMV will look for the Branch name and address to match what they have on file.

- Click the **Edit** link on the navigation toolbar to change the name and/or the **Primary Location** if incorrect and click **Save**.

Previous Page Edit

card file departments locations employees accounting vendors authorizations

Branch Information Primary Location

Branch: Territory: <https://qa1web1.nexsure.com/2id-178eid-4> - Nexsure - Microsoft Internet Ex...

Primary Contact Name: Title: E-Mail:

Edit Organization Information nexsure

Branch Name: Enter the correct issuer name on file with NY DMV

Primary Location: Brea, CA [123 Main Street]

Remittance Address: Oxford, AL [PO Box 6654]

Primary Contact: Oberleitner, Mary Legacy Branch ID:

Close Save

authorizations vendors accounting employees locations departments card file branch

- On the policy's **assignment** tab make sure the correct branch is identified as the **Primary** branch since this is where the **Name** and **Address** of the issuer populates from.

assignment attachments actions qualification history transactions claims summary of insurance classifieds delivery

Branch: Training - Implementation Branch Policy Term: 12/15/2009 12:01AM
12/15/2010 12:01AM

Policy Type/PrimaryState: Monoline / CA Coverage Term: 12/15/2009 12:01AM
12/15/2010 12:01AM

Issuing Co: Auto Owners Insurance Company Stage: Policy

Billing Co: Auto Owners Insurance Company Mode: New

Policy Number: CA-70000-1 Status: Future

Policy Description: Origin Date: 12/15/2009

List Print History In Force Save Changes

Viewable by Portal User: Client Retail Agent Carrier

[add retail agent] [add assignment]

Details Primary	Branch	Department	Responsibility	Unit	Name	Last Updated By	Date Updated	Remove
<input checked="" type="checkbox"/>	Training - Implementation Branch	Commercial Lines - 30>20 Days A61-2/OB2-3as	Producer	Unassigned	Mary Oberleitner	Mary Oberleitner	12/1/2009	

Restrict policy file access to assigned users only?



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- After clicking the carrier **Details** icon on the **Search** screen, select the **carrier name** tab and click the **Details** icon to enter and save the correct **NAIC Code** for the issuing carrier. The correct Carrier/NAIC combination (three digit NY carrier code) is populated based off of the NAIC that is input on this carrier name tab.

Carrier Profile: Auto Owners Insurance Company

Carrier Name: Auto Owners Insurance Company

Carrier Category: Traditional Intermediary

Carrier Types: Issuing Billing Internal

Carrier DB Rule: Post Direct Bill Commission to General Ledger

Carrier CD Rule: Re-run download using lenient criteria

Location(s): [\[Add New\]](#)

Details	Primary	Location Type	Address	City St./Prov./Postal	Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Corporate Headquarters	100 Main St.	Brea CA 92821	

NAIC Code: 18988

Integration Code:

Carrier Email:

Notes:

Last Updated By: Mary Oberleitner Date Updated: 1/21/2010 11:17:04 AM CST

- After confirming that the carrier **NAIC Code** is correct on the **carrier name** tab, make sure the correct issuing carrier is selected in the **Issuing Co** list on the policy's **underwriting** tab.

Client Profile: Jolt Electric, LLC

Branch: Training - Implementation Branch

Policy Type/Primary State: Monoline CA

Issuing Co: Auto Owners Insurance Company

Billing Co: Auto Owners Insurance Company

Policy Number: CA-70000-1

Policy Description:

Policy Term: 12/15/2009 12:01AM

Coverage Term: 12/15/2010 12:01AM

Policy: New

Status: Future Non-renewing

Origination Date: 12/15/2008

Navigation: Underwriting

Base Requirements

Auto - Commercial



TIPS AND FACTS

13. The **FEIN** or **NYDL#** for each named insured listed on the card is required. Make sure to enter the **FEIN** number on the client's **named insureds** tab for commercial lines accounts before adding the Auto ID card. To navigate to the **named insureds** tab, click the **Client Profile** link on the **Primary** menu, the **named insureds** tab, the **Details** icon for the existing named insured. To add, click the **Add New** link.

14. On the Nexsure Auto ACORD application make sure to type in the **Drivers License Number**.

Note: If a NY **Drivers License Number** does not exist, all zeros must be entered on the Auto ID card.

15. On the Nexsure Auto ACORD application, make sure the vehicle information is accurate including the **Year**, **Make** and **Vehicle Identification Number**.



TIPS AND FACTS

16. The following questions on the New York Auto ID cards do not flow from the ACORD application and must be populated prior to issuing:

- **NY FH1 and NY FH1B NY Auto ID Cards**

- # of Seats
- Replacement Vehicle?

verification details

Number: 9195
 Policy Number: CA-90000-NY
 Policy Description:
 Carrier Name: Auto Owners Insurance Company
 Reference:

Effective Date: 01/26/2010
 Expiration Date: 01/26/2011
 Coverage Effective Date: 01/26/2010
 Coverage Expiration Date: 01/26/2011
 Issued:

Preview Issue Abort Save Changes

Vehicle

Year: 2010
 Make: Ford
 V.I.N.: 1GTGG25V861248756
 # of Seats: 5
 Replacement Vehicle?: No

Auto Verification

NY FH1
 Producer
 Applicant
 Individuals
 Policy
 Vehicle

- **All Other NY Auto ID Cards**

- Replacement Vehicle?
- Historical?
- Tow Truck?

verification details

Number: 9195
 Policy Number: CA-90000-NY
 Policy Description:
 Carrier Name: Auto Owners Insurance Company
 Reference:

Effective Date: 01/26/2010
 Expiration Date: 01/26/2011
 Coverage Effective Date: 01/26/2010
 Coverage Expiration Date: 01/26/2011
 Issued:

Preview Issue Abort Save Changes

Vehicle

Year (Enter Year or ALP, AON, AOV, DGP): 2010
 Make: Ford
 V.I.N.: 1GTGG25V861248756
 Replacement Vehicle?: No
 Historical?: No
 Tow Truck?: No

Auto Verification

NY FS20
 Producer
 Applicant
 Individuals
 Policy
 Vehicle