



## TIPS AND FACTS

### Issue 6

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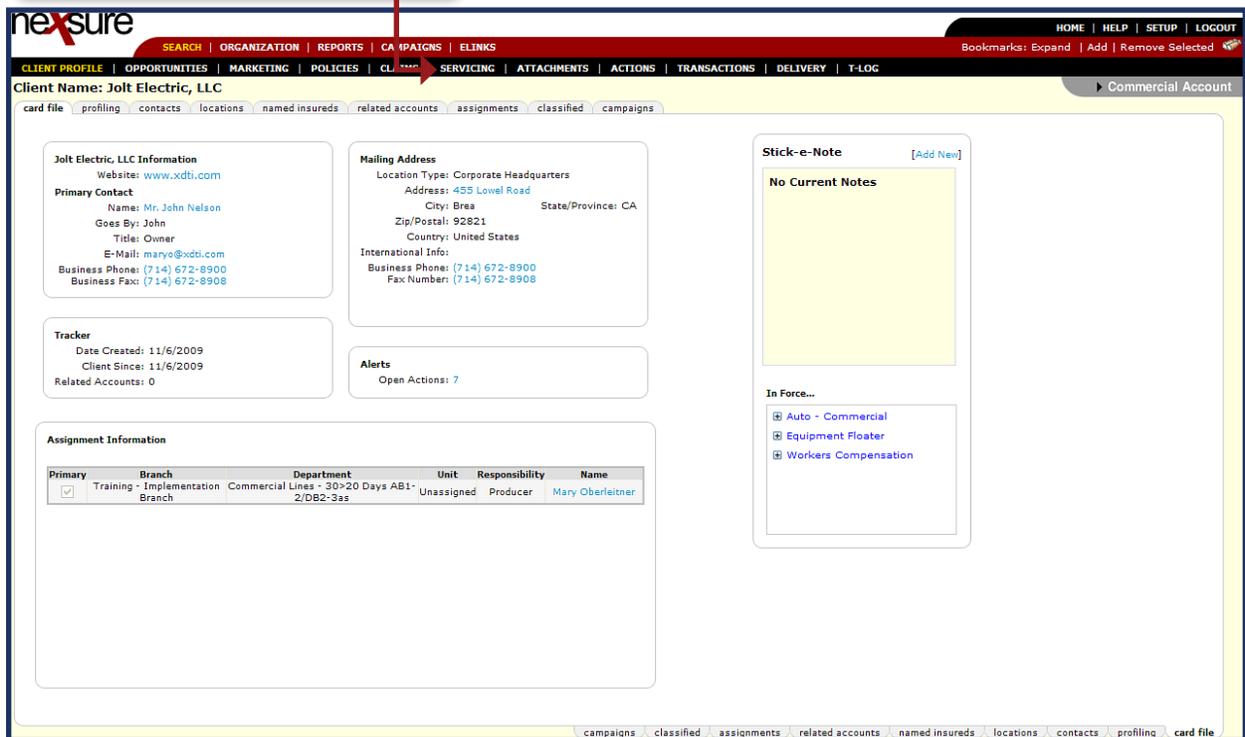
### Renewing Certificates in Nexsure

The certificate renewal process displays policies that have changed since the last issuance of a certificate. The certificate must be issued and have at least one holder to be available to renew.

#### How to Renew a Certificate

After accessing the appropriate client through **Search**, perform the following steps:

1. Click the **SERVICING** link.



The screenshot shows the Nexsure web application interface for the client 'Jolt Electric, LLC'. The navigation menu at the top includes 'SEARCH', 'ORGANIZATION', 'REPORTS', 'CAMPAIGNS', and 'ELINKS'. The 'SERVICING' link is highlighted in red, and a red box with the number '1' and the text 'Click the SERVICING link.' points to it. The main content area displays client information, including contact details, mailing address, and assignment information.

**Client Name:** Jolt Electric, LLC

**Jolt Electric, LLC Information**  
 Website: [www.xdti.com](http://www.xdti.com)  
**Primary Contact**  
 Name: Mr. John Nelson  
 Goes By: John  
 Title: Owner  
 E-Mail: [maryo@xdti.com](mailto:maryo@xdti.com)  
 Business Phone: (714) 672-8900  
 Business Fax: (714) 672-8908

**Mailing Address**  
 Location Type: Corporate Headquarters  
 Address: 455 Lowell Road  
 City: Brea State/Province: CA  
 Zip/Postal: 92821  
 Country: United States  
 International Info:  
 Business Phone: (714) 672-8900  
 Fax Number: (714) 672-8908

**Tracker**  
 Date Created: 11/6/2009  
 Client Since: 11/6/2009  
 Related Accounts: 0

**Alerts**  
 Open Actions: 7

**Assignment Information**

Primary	Branch	Department	Unit	Responsibility	Name
<input checked="" type="checkbox"/>	Training - Implementation Branch	Commercial Lines - 30>20 Days AB1-2/DB2-3as	Unassigned	Producer	Mary Oberleitner

**Stick-e-Note** [Add New]  
 No Current Notes

**In Force...**  
 Auto - Commercial  
 Equipment Floater  
 Workers Compensation



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- On the **Services** menu, click the **Renewal Certificate(s)** link. The list of policies meeting Certificate Renewal criteria will display.

The screenshot shows the Nexsure web application interface. The top navigation bar includes links for SEARCH, ORGANIZATION, REPORTS, CAMPAIGNS, and ELINKS. Below this, there are tabs for CLIENT PROFILE, OPPORTUNITIES, MARKETING, POLICIES, CLAIMS, SERVICING, ATTACHMENTS, ACTIONS, TRANSACTIONS, DELIVERY, and T-LOG. The main content area displays the client name 'Jolt Electric, LLC' and a list of services. The 'Renewal Certificate(s)' option is highlighted in yellow. A table of policies is shown below, with a 'Select' checkbox for each row. A red arrow points to the checkbox for the first policy row.

Select	Line of Business Policy Number	Stage Status	Mode	Updated By Updated Date	Premium	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
<input type="checkbox"/>	Auto - Commercial (CAUTO) CA-70000-1	Policy Future	Renew	Mary Oberleitner 12/1/2009	\$10000	12/15/2009 12/15/2010	12/15/2009 12/15/2010	Penn National Penn National

- Select the appropriate policy by clicking the **Select** check box.

- Click the **[Next]** link.



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### HOW to Provide Clients Access to Certificate Renewal Process

Clients may have numerous certificate holders associated to a policy, but not wish to issue a certificate renewal to every holder. Temporary access can be granted to clients so they can select which certificate holders will be issued a renewed certificate.

Follow steps 1-4 under **HOW to Renew A Certificate** to get to the window below:

1. If the agent would like the client to select the certificate holders needing a renewal certificate, click the **NIC (Nexsure Instant Collaborator\*\*)** link in the upper left corner.

The screenshot shows the Nexsure web application interface. At the top, there is a navigation bar with links for SEARCH, ORGANIZATION, REPORTS, CAMPAIGNS, and ELINKS. 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 profile for 'Jolt Electric, LLC' and a table of certificate holders. A red arrow points from the instruction above to the 'NIC - (Send this holder list to insured for review)' link in the top left corner of the interface.

Renew	Deliver	Description/Instructions	Cert. No	Named Insured	Cert. Holder	Reference	Issue Date	Status
<input checked="" type="checkbox"/>	<input type="checkbox"/>		9047-1	Jolt Electric, LLC	Central Pacific Mortgage Its Successors and/or Assigns	Active	12/1/2009	Active
<input checked="" type="checkbox"/>	<input type="checkbox"/>		9047-7	Jolt Electric, LLC	Wells Fargo	Active	12/1/2009	Active
<input type="checkbox"/>	<input type="checkbox"/>		9047-10	Jolt Electric, LLC	Brea Bank of California in Orange County	Active	12/1/2009	Active
<input checked="" type="checkbox"/>	<input type="checkbox"/>		9047-12	Jolt Electric, LLC	Central Bank	Active	12/1/2009	Active
<input checked="" type="checkbox"/>	<input type="checkbox"/>		9047-16	Jolt Electric, LLC	CNB Lending Services, LLC	Active	12/1/2009	Active
<input checked="" type="checkbox"/>	<input type="checkbox"/>		9047-32	Jolt Electric, LLC	Union Bank of California	Active	12/1/2009	Active
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1. Understanding the	9047-40	Jolt Electric, LLC	SouthTrust Bank NA	Active	12/1/2009	Active

The **Create Temporary User** dialog box is displayed. The client name will populate in the primary **Named Insured** column.

**Note:** If the contact that should have access is not in the list, add them and make sure to include their email address. To add, click on the **CLIENT PROFILE** link from the **Client** menu and then click the **contacts** tab.



\*\* Nexsure Instant Collaborator (NIC): NIC operates by simply extending to the person(s) involved, highly secured access to the specific area within Nexsure for direct input or update of the required information.



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2. From the **Select Contact** list, select the the contact's email address.

3. From the **Login Expires in** list, select the amount of days that the login will remain active.

4. Enter a message in the **Send the following message** box or accept the default message. The message will be the body of the email the contact receives. Make sure to instruct them to review and indicate which holders to issue certificates to for the renewal.

5. Click the **[Send]** link. A confirmation message will appear and the dialog box will remain open to grant temporary access for other contacts.

6. Click the **[Close]** link to close the window after all logins have been created.

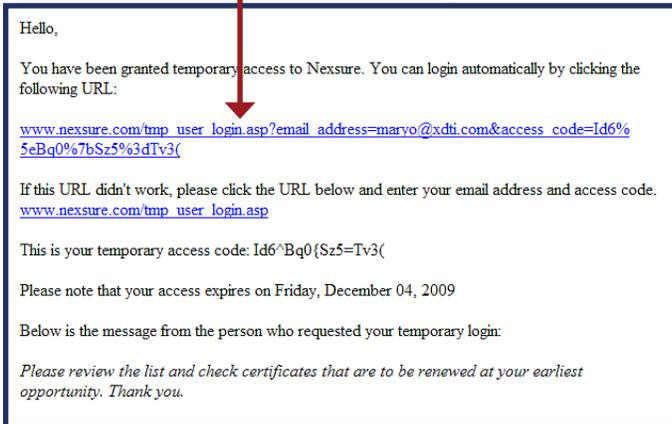
An email containing a link to the certificates will be delivered to the contact.



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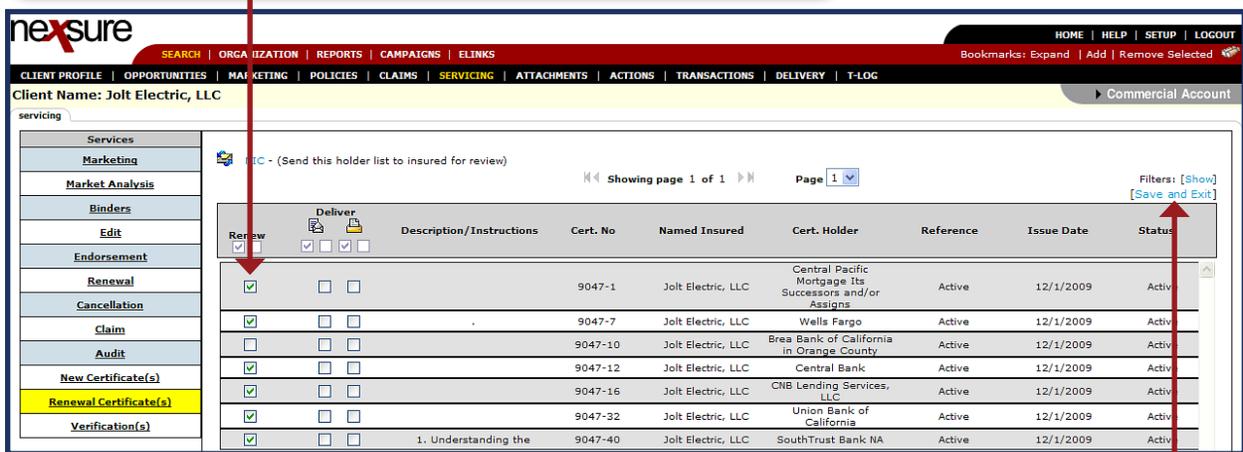
### HOW the User Selects the Certificates Using Email

1. Click the link in the email.



A browser window will open, allowing the review and selection of holders. The [ **Show** ] link can be used to filter the list. The **Showing Page** arrows and **Page** list can be used to navigate between pages if active.

2. Select the certificate holders that need to be renewed.



3. Once the certificate holders that need to be renewed are selected, click the [ **Save and Exit** ] link.



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A message may be sent to the Agency by entering text in the field provided.

nexsure

You have chosen to exit Nexsure. If this is correct press Ok, if not, press Cancel to return to to previous screen.

Your temporary access code will expire upon exiting.

If you would like to send a message to the agency user, please type it below:

Ok Cancel

4. Click **OK** to continue or **Cancel** to return to the previous screen.

**Note:** The temporary access code is only active for one session and expires when the contact exits the screen.

Once the user clicks **OK**, they are logged out of Nexsure and the link in the email is no longer valid. An email will be returned to the Nexsure agent notifying them that the contact has reviewed the summary of insurance.

nexsure

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You have successfully logged off of The Nexsure Policy Management System.

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### HOW to Issue the Renewal Certificates

1. After the client has reviewed the list of holders by using the NIC functionality or other method, repeat steps 1-4 under "How to Renew a Certificate" to display the holders for the selected certificates. Click the **Renew** checkbox to select the certificate holders to be renewed.

Client Name: Jolt Electric, LLC

Services: Marketing, Market Analysis, Binders, Edit, Endorsement, Renewal, Cancellation, Claim, Audit, New Certificate(s), **Renewal Certificate(s)**, Verification(s)

NIC - (Send this holder list to insured for review) Showing page 1 of 1 Page 1 Filters: [Show] [Back] [Next]

Renew	Deliver	Description/Instructions	Cert. No	Named Insured	Cert. Holder	Reference	Issue Date	Status
<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>		9047-1	Jolt Electric, LLC	Central Pacific Mortgage Its Successors and/or Assigns	Active	12/1/2009	Active
<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>		9047-7	Jolt Electric, LLC	Wells Fargo	Active	12/1/2009	Active
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>		9047-10	Jolt Electric, LLC	Brea Bank of California in Orange County	Active	12/1/2009	Active
<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>		9047-12	Jolt Electric, LLC	Central Bank	Active	12/1/2009	Active
<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>		9047-16	Jolt Electric, LLC	CNB Lending Services, LLC	Active	12/1/2009	Active
<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>		9047-32	Jolt Electric, LLC	Union Bank of California	Active	12/1/2009	Active
<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	1. Understanding the	9047-40	Jolt Electric, LLC	SouthTrust Bank NA	Active	12/1/2009	Active

2. Select the **Deliver** check box, if applicable, by clicking the appropriate delivery method: email , fax  or both check boxes. The email and fax numbers come from the primary contact numbers found on the **holder** tab of the previously issued certificates.

3. Click the **[Next]** link to process the certificate renewal.



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The **certificate renewal** tab is displayed stating the number of certificates that are ready for processing.

The screenshot shows the Nexsure web application interface. The top navigation bar includes links for SEARCH, ORGANIZATION, REPORTS, CAMPAIGNS, and ELINKS. Below this, there are tabs for CLIENT PROFILE, OPPORTUNITIES, MARKETING, POLICIES, CLAIMS, SERVICING, ATTACHMENTS, ACTIONS, TRANSACTIONS, DELIVERY, and T-LOG. The client name is Jolt Electric, LLC, and the account type is Commercial Account. The left sidebar lists various services, with 'Renewal Certificate(s)' highlighted in yellow. The main content area displays a message indicating that 1 certificate is ready for processing and provides instructions on how to proceed, including a red arrow pointing to the 'Next' link.

4. Click the **[Next]** link to process the certificate renewal.

Renewal certificates are processed in the background and are displayed in blue text on the **certificates** tab. A status of **Active** shown in black text indicates the successful creation of the certificate. Review and complete as normal prior to printing or delivering.

**Note:** The process cannot be aborted after clicking the **[Next]** link.