Chapter 2

Employee Record Maintenance

IN THIS CHAPTER

- ***** Employee Commissions
- * Employee Additional Logins
- ***** Employee Identity
- ***** Reassigning Clients to Another Employee
- * Changing Employee Logins

Employee Commissions

Employee commission defaults can only be created in the employee file located at the branch level where the employee has been added. Add employee commissions so they default to the invoices when transactions are created for client policies. To do so, perform the following:

- On the Primary menu, click the ORGANIZATION link to display the organization > card file tab.
- 2. Click the branches tab to display the branches in summary view.
- 3. Use the [Show] link to search for a specific branch by entering criteria and clicking the Search button to display matching branches.
- 4. Click the **Details** icon of the appropriate branch.
- 5. Click the **employees** tab.

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6. Click the **Details** icon of the appropriate employee.

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7. To access the commission screen, click the **commissions** tab.

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8. To add a Commission default for this employee, click the **[Add New]** link on the navigation toolbar to display the Add New Commission screen.

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- 9. Select a carrier from the **Carriers** drop-down box.
- 10. Select a line of business from the Lines of Business drop-down box.
- 11. The Sub-Code field is required and identifies the employee for the selected carrier.
- 12. Branch Employee defaults can be set using the check boxes located to the left of each default type and are used as follows:
 - **Department Default**: One for each department within a branch.
 - **Carrier Default**: One for each carrier within a branch.
 - Line of Business Default: One for each specific line of business within a branch.
 - **People Default**: One for the employee within a branch.

Note: If a default exists and another default is selected, it overwrites the existing default and becomes the current default within the branch.

- Complete the information selecting the Rate Type, entering the Rate, entering a Min(imum) and Max(imum) rate, if desired.
- 14. Entering the effective date in the **Eff. Date** field and expiration date in the **Exp. Date** field will limit the commission defaults to determine commission defaults at transaction level. For example, if the dates entered are expired dates, the commission will not default to the transaction record. If no effective or expiration dates are entered then the commissions will default regardless of the date range.
- 15. Entering an amount in the **Quota** field is optional.
- 16. The **Status** drop-down defaults to Active, but can be changed to Inactive if the commission default is no longer needed.

HOW the Proper People Commission Default is Determined when Invoicing

The system will first try to match within the branch, employee, carrier and line of business specifically. If the match is not exact, the system will search for a default line of business within the branch. If no default line of business exists, the system will search for the carrier default within the branch. Finally, if there is no carrier default, the system will search for the people default for the employee within the branch. If no people default exists for the employee, the system will display the message **No valid default commissions exist** and the user will create the commission entries manually.

Employee Additional Logins

Nexsure's eServices provides users real-time inquiry capabilities within a carrier's web site. This eliminates the need for the agency to log out of Nexsure or open another browser window to access the carrier's site. Users will have access to the very latest information directly from the carrier's web site – the same information the underwriters see. Once the Additional Logins have been added, the user can log into Nexsure, access the policy and click on the carrier name link to access the carrier site (For more information on eServices, see eServices). Keep in mind that the carrier information varies by carrier but sites can include:

- Billing Inquiry information
- Invoice Copy
- Policy Declaration Page
- Claims Inquiry information

Note: eServices are only available for in force business. It is not available for opportunities or marketing policies.

Each employee of the agency, who has login rights to a carrier's site, must have their login information entered in Nexsure to access eServices.

HOW to Add Employee Additional Logins for eServices

In order for eServices to operate correctly, make sure to enter the NAIC codes at the carrier level. (See Carrier setup)

- 1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.
- 2. Click the **employees** tab to display a summary view of all Employees within the organization.

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3. Use the **[Show]** link to search for the specific employee by entering their first or last name and clicking the **Search** button to return results.

Note: All employees should be added at the Organization level no matter where security is added or not added. Adding at the Organization level ensures that all maintenance on the records is done at one level.

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4. Click the **Details** icon beside the employee to display the employees detail screen.

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5. Click the **additional logins** tab to display the additional logins summary. Click the **Add New** link on the navigation toolbar to display the Add a new login pop-up window.

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Additional Login Type: Access General	*	
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Department ID:	(optional)	
Description:		
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User: Dora Brown [Administrator] Signed On At 6/27/2005 11:12:35 AM E	EST	Status: Online (Available)

Field	Description
Additional Login Type:	Select the carrier to add the login info to.
Account Number:	For user reference only, not required.

Field	Description
Login ID:	The ID used to gain access to the selected carrier's site.
Password:	The password used to gain access to the selected carrier's site.
Confirm Password:	Retype the password to confirm it has been entered correctly.
Department ID:	Only used if the carrier requires additional login information.
Description:	Used for reference by user, not required.

- 6. To complete the setup, click the **Save** button to store the information or the **Cancel** button to abort.
- To edit the additional login information, click the **Details** icon beside the additional login. Edit the information and click the **Save** button to store the information or the **Cancel** button to abort.
- To remove the additional login information, click the **Remove** icon beside the Additional Login and click the **OK** button to confirm deletion or the **Cancel** button to abort the removal of the login.

Employee Identity

An employee's photo, signature and a salutation may be added to their **identity** in Nexsure. To access the employee **identity** tab after logging in, follow the steps below:

- 1. On the Primary menu, click the **ORGANIZATION** link to display the **organization** > **card file** tab.
- 2. Click the **employees** tab to display a summary view of all employees within the organization.

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3. Use the **[Show]** link to search for the specific employee by entering their first or last name and clicking the **Search** button to return results.

Note: All employees should be added at the Organization level no matter where security is added or not added. Adding at the Organization level ensures that all maintenance on the records is done at one level.

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4. Click the **Details** icon beside the employee to display the employees detail screen.

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5. Click the **identity** tab to display tabs used for adding a photo, a salutation and a signature for the employee.

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		signature fil	e salutation employee photo

HOW to Add an Employee Photo

Employee photos are displayed when another staff member clicks on the employee name link. Follow the steps below to add a photo to the employee record.

- 1. Click the [add photo] link on the Employee Photo tab of the Identity screen. Photos must be JPG format and to avoid distortion, upload the photo with a height of 225 pixels and width of 150 pixels and the file size cannot be larger than 50KB.
- 2. The **Add new photo** screen is displayed. Click the **Browse** button to display the Choose file screen.



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3. Search for the picture on your computer and after selecting the appropriate file, click the **Open** button to return to the **Add new photo** screen.

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4. The path to the photo is added to the **Image path** field. Click **[Save]** to add the photo to the employee's identity. Click **[Cancel]** to abort the process. If the photo is too large a message displays to let you know to resize the photo.

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d file / regions imployee detail / employee photo	identity salutation	branches d additional logins signature file Add new pho	security security	ocations emp ommissions File size ca	accounting ployees accounting n not be r	accounting transactions	vendors	ns securi		logins identi	ty ∫ employee detai
d file regions mployee detail employee photo	territories identity i salutation	branches d additional logins signature file Add new pho Image path	spartments security oto	ocations) emp ommissions File size ca	accounting ployees accounting n not be r	accounting transactions transactions	vendors	ns securi	nexsure	logins identi	ty _ employee detai
nd file regions employee detail employee photo	identity salutation	branches d additional logins signature file Add new pho Image path	epartments security	ocations emp ommissions File size ca	accounting ployees) accounting n not be n [Save]	; transactions accounting transactions more than 51 [Cancel]	vendors 200 bytes.	ns / securi	ne sure	ogins identi	ty ∫ employee deta

accounting transactions

- 5. When [Save] is clicked, the photo is added to the employee identity.
- 6. To remove the photo, click the [delete photo] link. When an employee photo is deleted, the Employee Photo tab displays "No Employee Photo" with the [add photo] link active.



HOW to Add an Employee Signature

The employee's electronic signature may be used on applications, policy change requests, loss notices, certificates and binders issued at the policy level. Electronic signatures may also be used in Documents created with or without a Template. The signature can be set up within a Document Template to automatically merge into the document. The easiest way to create a signature is to scan the signature and crop out the unnecessary white space surrounding it. Save the signature to your local desktop with a **.jpg** extension. To add the signature, access the employee identity information screen by following the directions in the Employee Identity section of this chapter. After accessing the employee **identity** tab:



1. Click the **Signature File** tab. Click the **Click** <u>here</u> link to add a new signature. The **Add New Signature** screen is displayed.

Note: The signatures must be JPG format and sized within a height of 75 pixels and a width of 300 pixels. For more information on setting up a digital signature see *Tips & Facts Vol. 3, Issue 3* in Nexsure Help.

Click <u>here</u> to add new signature. Current signatu	To avoid distortion, please upload the signature with a beingt of 75 pixels and width	
No signature available	~	of 225 pixels.

2. Click the **Browse** button to display the files on your local computer.

Add new signature	
Image path:	Browse
Reference:	
	~

3. Locate the stored signature, highlight it and click the **Open** button.

Choose file					? 🔀
Look <u>i</u> n:	📇 My Pictures		•	🗢 🗈 💣 📰 •	
My Recent Documents Desktop My Documents	MP Navigator BC Photo.JPG BC Signature 2. BC Signature.JF Emp Photo.jpg g-logo-red-nex: Sample Pictures SiS.gif XDsignature.br	.JPG PG sure.gif s			
My Computer					
My Network Places	File <u>n</u> ame: Files of <u>t</u> ype:	BC Signature.JPG All Files (*.*)		• •	<u>O</u> pen Cancel

4. The path to the file will be displayed in the **Image path** field. In the **Reference** box, enter any necessary reference information for the signature. Click **[Save]** to add the signature to Nexsure. Click **[Cancel]** to abort adding the signature.

employee detail ide employee photo s	ntity additional logins security commissions accounting tran	Isactions
	Add new signature	ne sure
	Image path: C:\Documents and Settings\cormierb\My Do	cuments\My Pictures\BC S Browse
	Reference:	
	[Save] [[Cancel]
		signature file salutation employee photo

5. Multiple signatures may be added to an employee's identity. Only one signature may be active and available to select for use on forms or in documents. To inactivate a signature once it has been added, use the [Make Inactive] link. Once the signature is inactive, it will no longer be displayed in signature selection lists throughout Nexsure. If a signature is made inactive, any previous documents in which the signature was used will not be changed. A signature can be reactivated as long as no other signatures for that staff member are active.

Note: If an employee is made inactive in Nexsure, their signature will no longer be displayed for selection.



mployee photo salutati Click <u>here</u> to	on signature file	e. Current signa	ature is highlighte	ed.	To avoid distortion, please upload the
signature Reference Bdy Crieia	e Last Updated By Betsy Cormier	Last Updated	Make Active	Remove	of 225 pixels. Current Active Signature
Betsy Cormier	Betsy Cormier	10/29/2007 1:01:01 PM	[Make Active]	Ē.	Dersy Cormier

HOW to Secure an Employee Signature

An employee's electronic signature may be used on applications, policy change requests, loss notices, certificates and binders issued at policy level. Electronic signatures may also be used in Documents created with or without a Template. By default all users in the Organization will have access to an employee's signature. Security is available to limit access to the electronic signature to the owner of the signature or to specific authorized users of the signature.

Secure Access to Employee Signature to the Employee

After accessing the employee **identity** tab, click the **signature file** tab. The employee's signature is displayed. For information about adding an employee's signature, see "HOW to Add an Employee Signature" earlier in this chapter.

Place a check in the check box next to **Private (only owner can utilize this signature)**. Selecting this check box limits access to the signature to the employee, the owner of the signature. Marking the signature **Private** inactivates the **[control authorizations]** link.



Note: All employees have access to their own signatures, regardless of authorizations.

The signature will only be available to the employee. Any user other than the owner of the signature will know that the signature exists but will not be able to use the signature.

From the Producer section of the ACORD 125, a search for Producer Signature displays signatures available for employees assigned to the policy. If access to the signature is not authorized to the logged on user, the

signature will not pre-fill to the application.

Entity						
Brand	ch Contacts	× .	[Search] [Cl	ear]		
First Name			ast Name			
				Search Results		
	First Name	Last Name	Role	Branch	Authorized User	Signature Or File
	Betsy	Cormier	Account Manager	B C Insurance Agency, Inc.	V	4
	Mark	Cormier	Producer	B C Insurance Agency,		×

Control Access of Employee Signature to Authorized Users

By default all users in an Organization will have access to the employee's signature. From the employee's signature file tab, click the [control authorization] link to limit access to specified users. If the check box next to Private (only owner can utilize this signature) is checked, uncheck the box to activate the [control authorizations] link.

organization						
XDTITraining (<u>)rq</u> >> Mark Cormier					
Prev	rious Page					Add New
card file regions employee detail employee phot	territories branches de identity additional logins salutation signature file Click <u>here</u> to add new signatur	partments loca security com signature author e. Current signa	ations employee missions accou prization ture is highlighte	s accounti nting transact ed.	ng vendors tions To avoid distortion, signature with a height o	please upload the f 75 pixels and width
Signature	Reference Last Updated B	/ Last Updated	Make Active	Remove ^	of 225 pixels.	
Mesh Casaia	Betsy Cormier	10/10/2008 9:59:39 AM	[<u>Make Inactive</u>]	B	Current Active Mark Carn	Signature
					Private (only owner can Click [control authorization] users to utilize this a	utilize this signature) to allow only selected ctive signature.

An alert message displays. Click **OK** to continue and control authorizations. **Cancel** will abort the authorization process.



The **signature authorizations** tab is now active and displays the default summary view of **active Signature Authorizations**.

Previous Page			Update	Cancel
file regions territories b	ranches departments le	cations employees accour	nting vendors	
nployee detail identity addit	tional logins security c	mmissions accounting transa	actions	
employee photo salutation salutation	signature file signature au	horization		
Signature Authorization	ـــــــــــــــــــــــــــــــــــــ			Filter: [Show]
orginatar e mathematication	•			

Active authorizations are users who have been authorized to use the employee's signature. Click the [Show] link to search for users with an Authorization Status of Inactive. Inactive users are employees who have not previously been given authorization to use the employee's signature.

Previous Page		Update	Cancel	
d file regions territories b mployee detail identity addit	ranches departments locations er tional logins security commissions	mployees accounting vendors accounting transactions		
Signature Authorization			Filter: [[Hide]
First Name:	Last Name:	Title:	Authorization Inactive	-
First Name: E-mail:	Last Name: Employee Status:	Title:	Authorization Inactive Status:	•
First Name: E-mail: Sort Filters	Last Name: Employée Status:	mployees V Branch: All	Authorization Inactive V	
First Name: E-mail: Sort Filters Sort Field 1: Last Name	Last Name: Employee Status: Sort Order 1: Ascending	Title:	Authorization Inactive Status: Sort Order 2: Ascending Clear Sea	✓ arch

The filter Branch selection is for all Branches. To limit the search to all Inactive users belonging to a Branch, select the branch from the drop-down list. If the user to be authorized is assigned to multiple branches, leave the default at **All**. Fields are available to search by First Name, Last Name, Title and E-Mail address. Click the **Search** button and a list of **Inactive** (unauthorized) users that meet the search filter criteria is displayed.

Click the **Select** check mark to select all listed users or select each box individually. When all selections are made, click **Update** on the **Navigation Toolbar** to save the authorized employees.

organiz	ation								
XDTI	(DTITraining Org >> Mark Cormier								
	F	Previous Page				Update	Cancel		
card	card file regions territories branches departments locations employees accounting vendors								
em	iployee det	ail identity additional log	ins security co	mmissions account	ting transactions				
	employee p	hoto \curlyvee salutation \curlyvee signature	file signature aut	horization					
	Signatu	re Authorization		🛛 🖉 Displaying) Page 1 of 1 🕅 1 💌		Filter: [Show]		
	Select	Name	Employee Status	Title	Authorization Status	E-mail	Branch/Entity		
		Kelly Abrams	Active		Inactive	kelly.abrams@xdti.com	n B C Insurance Agency, Inc.		
	>	Dora Brown	Active	Account Manager	Inactive		B C Insurance Agency, Inc.		
	V	Account Manager Cormier	Active	Account Manager	Inactive	betsplus3@juno.com	B C Insurance Agency, Inc.		
		Betsy Cormier	Active	Producer	Inactive	Betsy.Cormier@xdti.co	m B C Insurance Agency, Inc.		

The screen will refresh to display the remaining **Inactive** users.

employee pl	amployee photo salutation signature file signature authorization						
Signature Authorization				Displaying Page 1 of 1	1 🗸	Filter: [Show]	
Select	Name	Employee Status	Title	Authorization Status	E-mail	Branch/Entity	
	Betsy Cormier	Active	Producer	Inactive	Betsy.Cormier@xdti.com	B C Insurance Agency, Inc.	

To return to the default view of **Active** users, click the [**Show**] link. Click **Clear** to clear all search criteria and then select **Authorization Status** of **Active**. Click **Search** to display a list of all users authorized to access the employee's signature.

Return to the **signature** tab. The authorization link has changed to "Click **[do not control authorization]** to allow all users to utilize this active signature".

emp	oloyee photo	salutation	signature file	signature auth	orization		
	Click here to add new signature. Current signature is highlighted.					To avoid distortion, please upload the signature with a height of 75 pixels and width	
1	Signature	Reference	Last Updated By	Last Updated	Make Active	Remove	of 225 pixels.
	Nek Canin		Betsy Cormier	10/10/2008 9:59:39 AM	[Make Inactive]	6	Current Active Signature Mark Carmier
							Private (only owner can utilize this signature) Click [do not control authorization] to allow all users to utilize this active signature.

Update the list of authorized users from the **signature authorizations** tab. Use the filter to search for new employees to be given authorization or to remove authorization from individual employees.

To remove all controls and allow access to the employee's signature to all users, click the [**do not control authorization**] link. The link toggles back to "Click [**control authorization**] to allow only selected users to utilize this active signature" and the **signature authorizations** tab is no longer active.

HOW to Add an Employee Salutation

The employee salutation is used on Nexsure deliveries for e-mails and faxes as a closing. To add the salutation, go to the employee **identity** tab by following the directions in the Employee Identity section of this chapter. After accessing the employee **identity** tab:

1. Click the **Salutation** tab. Click the **[add salutation]** link to display the Add A Salutation screen.

employee detail identity additional logins security commissions accounting transactions		
employee photo salutation signature file		
Employee Salutation	[add salutation]	
No Employee Salutation		
	signature file s	salutation employee photo

employee detail identity ad employee photo salutation	ditional logins security commissions accounting transactions signature file	
	Add A Salutation	nevsure
	Name	*
	Text	
	[Cancel] [Save]	

- 2. Enter the employee name in the **Name** field.
- 3. In the **Text** field enter the employee name and designations, Branch name, title, phone numbers, confidentiality statement, etc. Anything needed for an e-mail or fax document closing.
- 4. Click the **Save** link to store the information or **Cancel** to abort.
- To edit the salutation, click the [edit salutation] link. Click [Cancel] to abort any changes or [Save] to save changes.
- 6. To remove the salutation, click the [delete salutation] link. A confirmation pop-up window is displayed. Click [OK] to continue and remove the salutation. The screen refreshes and the salutation is removed. Click [Cancel] to keep the salutation.

employee detail identity a employee photo salutation	dditional logins (security) commissions (accounting transact signature file)	tions
	Employee Salutation	[edit salutation] [delete salutation]
	Name	
	Dora Brown	
	Text	
	Dora Brown, CIC Account Manager (800) 555-5555 Statement of Confidentiality The contents of this e-mail message and any atta	chments are confidential and are i

Reassigning Clients to Another Employee

When employees are no longer employed with an organization, it is possible to reassign their clients to another employee that belongs to the same Branch. Using the reassign option will change the client and policy assignments as well as any open actions. History policies and their associated actions will not be reassigned from their original assignment. After reassigning the employee, access the **employees** tab, remove the

security template assigned and then mark the employee as terminated by accessing the employee summary screen and clicking the **Deactivate** icon. Follow the instructions below to reassign clients:

Click the **ORGANIZATION** link on the **Primary** menu, the **branches** tab and the **Details** icon for the branch the employee is assigned to. Click the **employees** tab to display all employees associated with the branch. Use the navigation buttons or the [Show] link to search for the employee if necessary. Once the employee is located, click the **Details** icon next to the employee to display the employee detail file.

nevsure	Э				Home Help Setup Logout
	SEARCH 0	RGANIZATION REPORTS			Bookmarks: Expand Add Remove Selected
ORGANIZATION PRO	OFILE ALL EMPLO	YEES ALL LOCATIONS			
Organization N	ame: XDTITra	ining Org 972003			 Organization
branch					
XDTITraining	1 Ora 972003 >> .	AAA Region >> AAA Territo	ry >> AAA Branch		
Pr	evious Page				Add New
card file depar	tments locations	employees accounting ven	dors ivans authorizations		
Employees		N -	Showing Page 1 of 1		Filter: [Show]
Details Prima	ry Name	Availability	Title	Email	Deactivate
*	Brown, Dora	Offline	Default	brown.dora@aoins.co	om 🖷
	Morrison, Jim	Offline	Account Manager	jmorris@tnd.com	

On the terminated **Employees** detail screen, click the **Re-Assign** link on the **Navigation Toolbar** to display the **Re-Assign** dialog box.

exsure			Home Help Setup Lo
SEARCH ORGA	NIZATION REPORTS		Bookmarks: Expand Add Remove Se
SANIZATION PROFILE ALL EMPLOYEES	ALL LOCATIONS		
janization Name: XDTITrainin	ng Org 972003		Organization
nch			
DTL Tubing Dec 072002 SS AAA		> AAA Busneh >> Tim Meuvisen	
Previous Page	<u>A Region</u> >> AAA Territory >	Re-Assign	Update
ard file departments locations em	ployees accounting vendors	ivans authorizations	
employee detail identity additional	logins security commissions	accounting transactions	
	•	· • ·	
Employee Information			
Prefix First	MI Last	Suttix Goes By	
mit 👻	Morrison	Jim	
Title Sex	DOB	Social Security No. Marital Status	
Account manager	4/12/1900	(000-00-0000)	
		(000-00-0000)	
Univer Information St./Prov. Licen	sed License Number	Date Licensed	
HI 💟	45895800000	(200)	
Is this the PRIMARY CONTACT for this br	anch? 🔘 Yes 💽 No Co	ntact Role: 🗸 🗸	
The PRIMARY LOCATION for this employe	ee is: Waterford, IA [4479 Pon	tiac Lake Rd Ste 2] 💌	
Personal Numbers		[Add New]	
	No Bhopo Record(c) Found		

Re-Assign Clients

On the **Re-Assign** window select the employee to whom items are to be assigned to. Any active employees added in the selected branch level are available for selection.

To re-assign open personal actions only, select the Open Personal Actions check-box and click the [Next]

link. However, if open personal actions and clients are both to be re-assigned, select the **Client Level** check box and open personal actions. Select **By Client** to choose which clients are to be reassigned and click the **[Next]** link. Keep in mind that in this process the responsibility on these records will remain in-tact in client re-assignment.

Re-Assign		ne	essure
To re-assign actions, policies and/or clients for Betsy Mason , please select from an active employee below.			
Chaplan, Charles			
Hernandez, Cindi			
Mason, Betsy			
Oberleitner, Cathy			
Oberleitner, Mary			
Assignment Type: ☑ Open Personal Actions ☑ Client Level			
By Client			
By Policy			
By Employee Responsibility			
By Line of Business			
	[Re-Assign]	[<u>Next</u>]	[Cancel]

The **Client Selection** Screen is displayed. To select all clients, select the **Select** check box located in the header. To select individually, select the client's name. Click the **Client Name** header to sort the list in reverse order.

Re-Assign						ne	e sure
Please select the o	lient(s) needed to be re-assigned.					Filter	rs: [Show]
Select	Client Name 🔺	Stage	Status	Туре			
~	Cormier Testing Services	Client	Active	Commercial			
	Kelly Travel	Client	Active	Commercial			
	McDonough Client	Client	Active	Commercial			
L					[Previous]	[Next]	[Cancel]

Due to system performance all the clients assigned to an employee up to 2,000 records in a single screen will be returned. Should more than 2,000 records exist a warning message is displayed. Modification of results may be achieved by clicking the [Show] link and entering specific search criteria.

After completing selections, click the [Next] link to continue.

To include open actions in the re-assignment, select the **Yes** option on this screen to the question "Do you want to include all OPEN actions associated to the selected..." and click the **[Re-Assign]** link. Clicking the **[Cancel]** link will abort the process. To update all unposted invoices to the selected user the records are being re-assigned to, select the Yes option on this screen for the question "Do you want to change the employee on the Other Commissions section on unposted policy level invoices?"

Re-Assign		ne	sure
Do you want to include all OPEN actions associated to the clients that are being reassigned?			
○ Yes ○ No			
Do you want to change the employee on the Other Commissions section on unposted client level invoices?			
◯ Yes ◯ No			
	[Previous]	[Re-Assign]	[Cancel]

The confirmation for the re-assignment is displayed providing an option to continue with more **Re-Assignments** or **Close**.



Re-Assign By Employee Responsibility

Use this feature to globally modify an existing employee's responsibility or to reassign all occurrences of the responsibility to another user and responsibility. Select the **Assignment Type** and **By Employee Responsibility** for the criteria type and click the [Next] link.

Re-Assign			ne	e sure
To re-assign actions, policies and/or clients for Bets	y Mason, please select from an active employee below.			
Chaplan, Charles				
Hernandez, Cindi				
Mason, Betsy				
Oberleitner, Cathy				
Oberleitner, Marv				
Assignment Type: Open Personal Actions Cli Please select the criteria type needed to re-assign. By Client By Policy	ent Level ⊻ Policy Level			
By Employee Responsibility				
By Line of Business				
	[Re	e-Assign]	[Next]	[Cancel]

On this screen select to highlight the **Responsibility to be re-assigned** in the top box. In the bottom box, select the **Responsibility to assigned TO** and click the **[Next]** link.



Re-Assign		ne	e sure
Please select the Responsibility needed to be re-assi	gned.		
Producer			
Please select the Responsibility to assign TO:			
Account Manager			
Administrator			
Assistant CSR			
Benefits Account Manager			
Benefits Producer			
Bond Producer			
Bonds Account Manager 🛛 🕑			
	[Previous]	[Next]	[Cancel]

After completing selections, click the [Next] link to continue.

To include open actions in the re-assignment, select the **Yes** option on this screen to the question "Do you want to include all OPEN actions associated to the selected..." and click the **[Re-Assign]** link. Clicking the **[Cancel]** link will abort the process. To update all unposted invoices to the selected user the records are being re-assigned to, select the Yes option on this screen for the question "Do you want to change the employee on the Other Commissions section on unposted policy level invoices?"



Note: When re-assigning actions all open actions assigned to any user on the selected records will be re-assigned to the user selected to re-assign the records to. If this is not the desired outcome search and locate open actions for the current assignment on the Home > Actions screen. Make sure to clear the date filters prior to searching. Open each action and reassign to the new assignment.

The confirmation for the re-assignment is displayed providing an option to continue with more **Re-assignments** or **Close**.



Re-Assign By Policy

Not only can **By Client** and **By Employee Responsibility** be changed at policy level but by policy and line of business re-assignment. To re-assign by policy, select Policy Level check box, select the name to re-assign the policies to, select **By Policy** and click the [Next] link.

Note: By Client and By Employee Responsibility are reassigned the same as Client Level in the above instructions, but make sure to select Policy Level instead of Client Level.

Re-Assign		ne	exsure
To re-assign actions, policies and/or clients for Betsy Mason, please select from an active employee below.			
Chaplan, Charles Hernandez, Cindi Mason, Betsy Oberleitner, Cathy Oberleitner, Mary			
Assignment Type: Open Personal Actions Client Level Policy Level Please select the criteria type needed to re-assign. By Client By Policy			
By Employee Responsibility By Line of Business	[Re-Assign]	[Next]	[Cancel]

Use the search filters to locate specific information, select all by clicking the **Select** check box in the header or select policies only as needed.

Re-Assign					ne sure
Please select the policies needed	to be re-assigned.				Filters: [<u>Hide</u>]
Search Filters					
Search Type: Contains	~	Client Name:			
Policy No.:		Stage:	All 🔽		
Issuing Carrier:		Status:	All	~	
Line of Business:		Mode:	All		
Sort Filters					
Sort Field 1: Policy No.	Sort Order 1:	Ascending 🔽	Sort Field 2: Line	of Business	Sort Order 2: Ascending 💌
					Search Clear
Select Policy No. 🔺	Client	Stage	LOB	Status	Issuing Carrier
Aig1345	McDonough Client	Policy	Crime	In Force	AIG National Insurance Company
Aig1345	McDonough Client	Endorsement	Crime	Submitted	AIG National Insurance Company
Aig1345	McDonough Client	Endorsement	Crime	Submitted	AIG National Insurance Company
Aig1345	McDonough Client	Endorsement	Crime	Submitted	AIG National Insurance Company
Aig1345	McDonough Client	Endorsement	Crime	Pending	AIG National Insurance Company
Auto19734	McDonough Client	Policy	Auto - Commercial	In Force	AIG National Insurance Company
Auto19734	McDonough Client	Endorsement	Auto - Commercial	Submitted	AIG National Insurance Company
Auto19734	McDonough Client	Endorsement	Auto - Commercial	Submitted	AIG National Insurance Company
					[Previous] [Next] [Cancel]

Due to system performance all the policies assigned to an employee up to 2,000 records in a single screen will be returned. Should more than 2,000 records exist a warning message is displayed. Modification of results may be achieved by clicking the [Show] link and entering specific search criteria.

After selecting the completing selections, click the [Next] link to continue.

To include open actions in the re-assignment, select the **Yes** option on this screen to the question "Do you want to include all OPEN actions associated to the selected..." and click the **[Re-Assign]** link. Clicking the **[Cancel]** link will abort the process. To update all unposted invoices to the selected user the records are being re-assigned to, select the **Yes** option on this screen for the question "Do you want to change the employee on the Other Commissions section on unposted policy level invoices?"



Note: When re-assigning actions all open actions assigned to any user on the selected records will be re-assigned to the user selected to re-assign the records to. If this is not the desired outcome search and locate open actions for the current assignment on the Home-Actions screen. Make sure to clear the date filters prior to searching. Open each action and reassign to the new assignment.

The confirmation for the re-assignment is displayed providing an option to continue with more **Re-assignments** or **Close**.

Re-Assign	ne sure
Re-Assignment Successful.	
To re-assign more clients/policies from the same employee, select Re-assign.	
	Re-Assign Close

Re-assign by Line of Business

To re-assign by line of business, select the **Policy Level** check box, select the name to re-assign the policies to, select **By Line of Business** and click the **[Next]** link.



Use the drop-down boxes to help locate the specific line of business, click to highlight and click the **Right** Arrow button. To include package policies, select the **Inculde Package Policies** check box and select one of the following options:

- Packages that include ANY of these Lines of Business
- Packages that include ALL of these Lines of Business
- Packages that include ONLY these Lines of Business

Note: If Include Package Policies is not selected, they will not be re-assigned.

State:	All	☑ Include Package Policies	Ĵ
Available Lines 401K - Group 401K - Individ Accident - Inc AD&D - Grou AD&D - Individ Advertising/M	All All Benefits Bond Commercial Lines Financial Services Personal Lines ual lividual p dual leability menorial	For package policies, please select one of the following:	
Aircraft - Glid Aircraft - Indu Aircraft - Non	er strial Aid -Owned		
		[Previous] [Nex	t] [Cancel]

Due to system performance all the policies assigned to an employee up to 2,000 records in a single screen will be returned. Should more than 2,000 records exist a warning message is displayed. Modification of results may be achieved by clicking the [Show] link and entering specific search criteria.

After selecting the LOB's click the [Next] link to continue.

To include open actions in the re-assignment, select the **Yes** option on this screen to the question "Do you want to include all OPEN actions associated to the selected..." and click the **[Re-Assign]** link. Clicking the **[Cancel]** link will abort the process. To update all unposted invoices to the selected user the records are being re-assigned to, select the Yes option on this screen for the question "Do you want to change the employee on the Other Commissions section on unposted policy level invoices?"



Note: When re-assigning actions all open actions assigned to any user on the selected records will be re-assigned to the user selected to re-assign the records to. If this is not the desired outcome search and locate open actions for the current assignment on the Home > Actions screen. Make sure to clear the date filters prior to searching. Open each action and reassign to the new assignment.

The confirmation for the re-assignment is displayed providing an option to continue with more **Re-assignments** or **Close**.

Re-Assign	ne sure
Re-Assignment Successful.	
To re-assign more clients/policies from the same employee, select Re-assign.	
	Re-Assign Close

Changing Employee Logins

When an employee is married or divorced, or a company email provider is changed, it may be necessary to change a login ID. Make sure when changing login IDs to be consistent with the naming conventions used. Maintaining a set methodology ensures the login is unique and not already in use by someone else.

The process to change the employee login is completed by accessing the employee security screen as follows:

- 1. Click the **ORGANIZATION** link on the **Primary** menu.
- 2. Click the **employees** tab.
- 3. Use the navigation buttons or the [Show] link to search for the employee if needed.
- 4. Click the **Details** icon for the desired employee on the employee summary screen to display the employee detail screen.

exs	ure				Home Help Setup Logol
	SEARCI	H ORGANIZATION REPORTS	Bookma	rks: Expand Add Remove Select	
RGANIZATIO	ON PROFILE ALL E	MPLOYEES ALL LOCATIONS			
ganizati	on Name: XDTI-	Training Org 972003			 Organization
qanization					
-					
XU111Pa	Previous Page	<u>1</u>			Add New
card file	regions territories	branches departments locations	employees accounting vendors		
Employ	yees	H -	Showing Page 1 of 1	1 💌	Filter: [Show]
Details	Primary Employee	Availability	Title	E-Mail	Deactivate
*	Cline, David	Offline		maryo@xdti.com	E C
		vendo	ors accounting employees loca	tions departments branches	territories regions card file
					organization

- 5. Click the **security** tab to bring up the **security** screen. If the employee has been assigned security under the **User Accounts** section of the screen, it must be removed.
- 6. Click the **Remove** icon.

SEARCH ORGANIZA	TION REPORTS			Bookmarks: Exp	and Add Remove
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me regions cerritories branches	departments focations	employees accounting vend			
mployee detail Y identity Y additional login	s security commissions	accounting transactions			
Employee Name: David Cline				User St	tatus: Active
o add/edit a user for this account, enter the l	ogin information and click on t	the Save/Update link on the naviga	tion bar at the top.		
ogin internation	Login name: david63				
	New password:				
Cor	firm new password				
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Lo	gin expiration date:	and time:			
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A	cess allowed from: 4:00:00	AM			
А	cess allowed until: 11:59:0	0 PM			
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	t:. d:kl.d.				
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User Accounts	И∢	Showing Page 1 of 1	M		[Add New]
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Details Location Entity Name	Entity Type	Rights	Status	Date Created	Remove
Atlantic Territory	Territory	Account Auditors	Active	11/4/2005	E
		accounting transactions / con	nmissions security	additional logins ident	dty 人 employee detail
		and accounting amplement	locations door	nto I henrehar I ermierni	as regions and f
		rs accounting Employees	locacions departine	brancies cerritori	es regions cardin

Microsoft Internet Explorer		
2	Are you sure you want to delete this record?	
	OK Cancel	

After removing the security for the employee, the Login Name: field becomes active.

8. Enter the new login name and click the **Save** link to store the change.

iex sure	HOME HELP SETUP LOGO
SEARCH ORGANIZATION REPORTS	Bookmarks: Expand Add Remove Selec
RGANIZATION PROFILE ALL EMPLOYEES ALL LOCATIONS	
ganization Name: XDTITraining Org 972003	Organization
ganization	
XDTITraining Org 972003 >> David Cline	
Previous Page	Save
card file regions territories branches departments locations employees accounting w	
employee detail identity additional logins security commissions accounting transactions	
Employee Name: David Cline	User Status:
To add/edit a user for this account, enter the login information and click on the Save/Update link on the na	vigation bar at the top.
Login Information	
-	
New password:	
Confirm new password:	
Time zone: (GMT-08:00) Pacific Time (US & C	ianada); Tijuana 🛛 🔽
Automatically adjust clock for Day	light Savings Time (DST)
Login expiration date: and time:	
Change of password required:	
Access allowed from: 1:00 AM	
Access allowed until: 11:30 PM	
Notify admin upon login:	
Allow login on Saturday: 📝	
Allow login on Sunday: 🔽	
Login disabled: 📃	
accounting type actions	commissions a security a additional logins a identity of amplause detail
accounting damaactions	(control of the second se

After clicking the **Save** link the login name is changed and no longer active.

nevsure			
	Bookmarks: Expand Add Remove Selected		
ORGANIZATION PROFILE ALL EMPLOYEES ALL LOCATIONS			
Organization Name: XDTITraining Org 972003	Organization		
organization	<u>^</u>		
VDTL-Tesising Org 072002 SS David Cline			
Previous Page	Update		
card file regions territories branches departments locations employees accounting ve			
employee detail identity additional logins security commissions accounting transactions			
Employee Name: David Cline	User Status: Inactive		
To add/edit a user for this account, enter the login information and click on the Save/Update link on the nav	igation bar at the top.		
Login Information			
Login name: dave@xdti			
New password:			
Confirm new password:			
Time zone: (GMT-08:00) Pacific Time (US & Ca	nada); Tijuana 🛛 🗸		
Automatically adjust clock for Dayli	ght Savings Time (DST)		
Login expiration date: and time:			
Change of password required:			
Access allowed from: 1100-00 AM			
Assess allowed webits 111/20:00 DM			
Access anowed didit: 11:30:00 PM			
Notity admin upon login:			
Allow login on Saturday: 🔽			
Allow login on Sunday: 🔽			
Login disabled: 📃			
No record(s) found. Click <u>here</u> to add security.			
List Mary Oberlettner [Administrator] Signed On At 3/10/2006 11:11:46 AM CST Status: Online (
	Statas: Shine (Available)		

- 9. Click the **No record(s) found. Click <u>here</u> to add security** link at the bottom of the screen to add the updated security settings to the employee record.
- 10. Select the security template to apply from the **User Rights:** drop-down box and click the **Add** button to complete the process.

🗿 https://nexweb16.nexsure.com - User Rights Infor <mark>e</mark> st 🔳 🗖 🔀				
User Rights Informatio	ne sure			
Entity Type:	Organization 💌			
Entity Name:	Atlantic Branch 💌			
Status:	Active 💙			
User Rights:	Account Auditors			
	Cancel Add			
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