

Chapter 2

Employee Record Maintenance

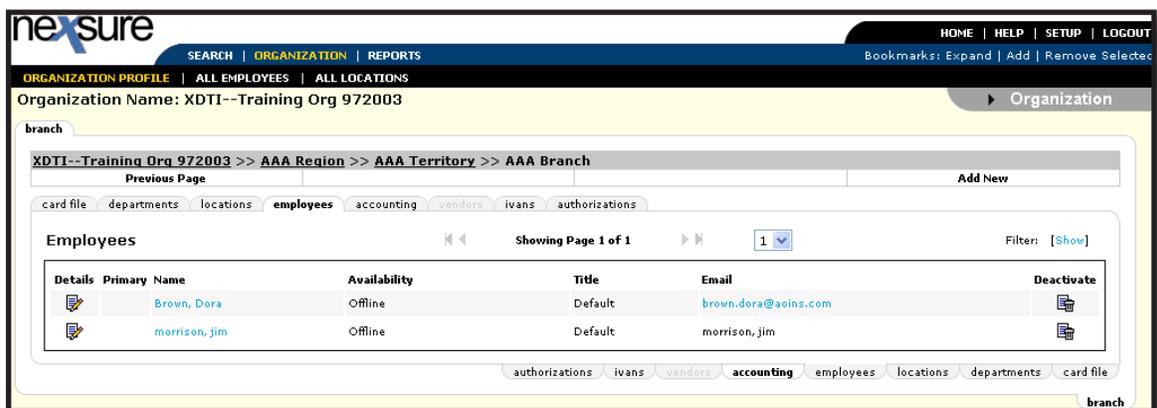
IN THIS CHAPTER

- ✖ 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:

1. 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.



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

nexsure SEARCH | ORGANIZATION | REPORTS HOME | HELP | SETUP | LOGO
 ORGANIZATION PROFILE | ALL EMPLOYEES | ALL LOCATIONS Bookmarks: Expand | Add | Remove Selected
 Organization Name: XDTI--Training Org 972003 Organization

branch
 XDTI--Training Org 972003 >> AAA Region >> AAA Territory >> AAA Branch >> Ms. Dora Brown
 Previous Page Re-Assign Update

card file departments locations employees accounting vendors ivans authorizations
 employee detail identity additional logins security commissions accounting transactions

Employee Information
 Prefix First MI Last Suffix Goes By
 Ms. Dora Brown Dora
 Title Sex DOB Social Security No. Marital Status
 Female (000-00-0000) Single

Driver Information
 St./Prov. Licensed License Number Date Licensed
 Is this the PRIMARY CONTACT for this branch? Yes No Contact Role

The PRIMARY LOCATION for this employee is: Waterford, IA [4479 Pontiac Lake Rd Ste 2] [Add New]

Details	Phone Type	Phone	Ext	Desc	Delete
	Underwriting	(800) 523-5846	208		

E-Mail Address
 E-Mail: brown.dora@aoins.com E-Mail 2:

Contact Notes

User Information (Optional)
 Click [here](#) to make this contact a user.

accounting transactions commissions security additional logins identity employee detail

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

nexsure SEARCH | ORGANIZATION | REPORTS HOME | HELP | SETUP | LOGOUT
 ORGANIZATION PROFILE | ALL EMPLOYEES | ALL LOCATIONS Bookmarks: Expand | Add | Remove Selected
 Organization Name: XDTI--Training Org 972003 Organization

branch
 XDTI--Training Org 972003 >> AAA Region >> AAA Territory >> AAA Branch >> Ms. Dora Brown
 Previous Page Add New

card file departments locations employees accounting vendors ivans authorizations
 employee detail identity additional logins security commissions accounting transactions

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

accounting transactions commissions security additional logins identity employee detail
 authorizations ivans vendors accounting employees locations departments card file

branch

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

card file departments locations employees accounting vendors authorizations

employee detail identity additional logins security commissions accounting transactions

Commission Information

Department: Commercial Lines - 30>20 Days AB1-2/DB2-3a Department Default

Carriers: Hartford Insurance Carrier Default

Lines of Business: Auto - Commercial Line Of Business Default

Sub-Code: 198 People Default

	Rate Type	Rate	Min.	Max.	Eff. Date	Exp. Date	Quota	Status
New:	% of Agency Comm	20	0	0	8/20/2008		\$ 0	Active
Renew:	% of Agency Comm	20	0	0	8/20/2008		\$ 0	Active
Rewritten:	% of Agency Comm	20	0	0	8/20/2008		\$ 0	Active

accounting transactions commissions security additional logins identity employee detail

authorizations vendors accounting employees locations departments card file

branch

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.

13. 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

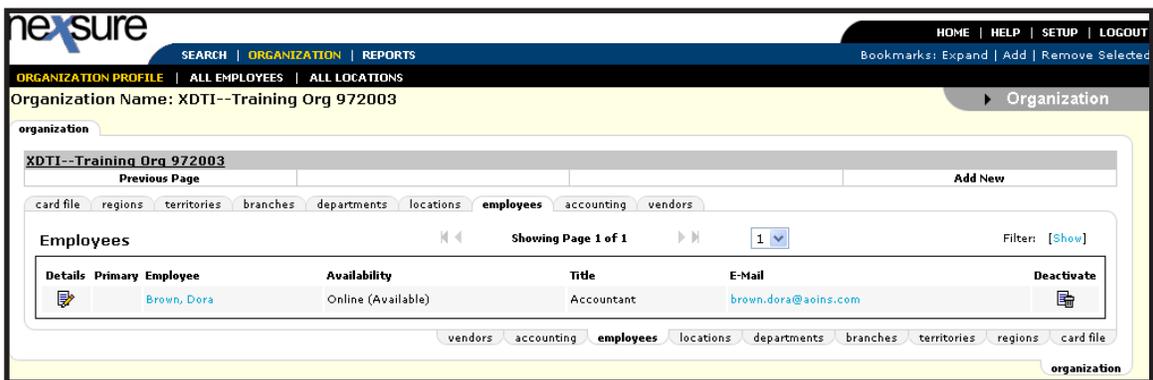
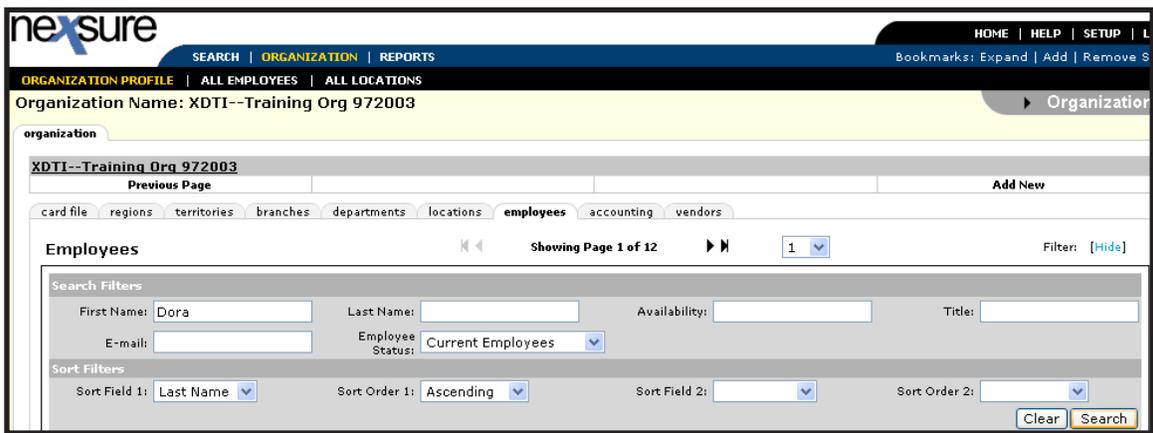
In order for eServices to operate correctly, make sure to enter the NAIC codes at the carrier level. (See Carrier setup)

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.



- 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.



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

Employee Information

Prefix: Ms. First: Dora MI: Last: Brown Suffix: Goes By: Dora

Title: Accountant Sex: Female DOB: Social Security No.: Marital Status: Single

(000-00-0000)

Driver Information

St./Prov. Licensed: License Number: Date Licensed:

Is this the **PRIMARY CONTACT** for this organization? Yes No Contact Role:

The **PRIMARY LOCATION** for this employee is: Waterford, IA [4479 Pontiac Lake Rd Ste 2]

Personal Numbers [Add New]

Details	Phone Type	Phone	Ext	Desc	Delete
	Underwriting	(800) 523-5846	208		

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.

Additional Login Information

No record(s) found.

Add a new Login

Additional Login Type: Access General

Account Number:

Login ID: dora@ins-email

Password:

Confirm Password:

Department ID: (optional)

Description:

Cancel Save

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.

- 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

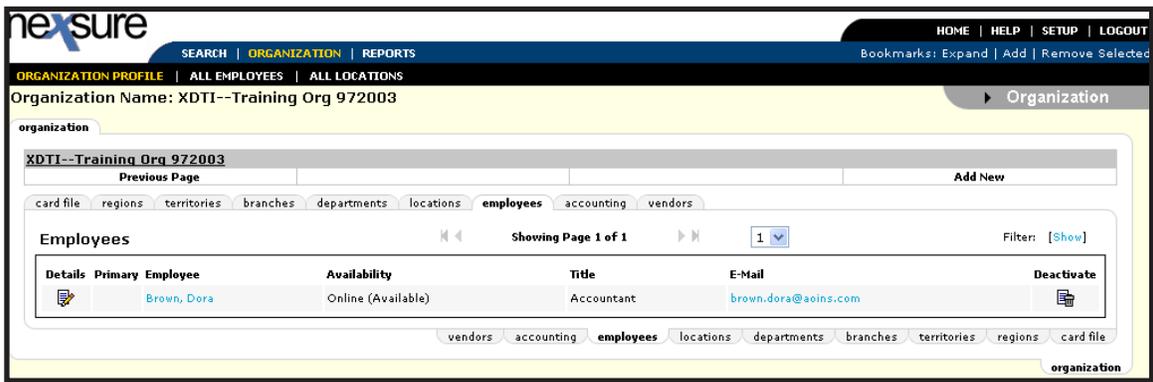
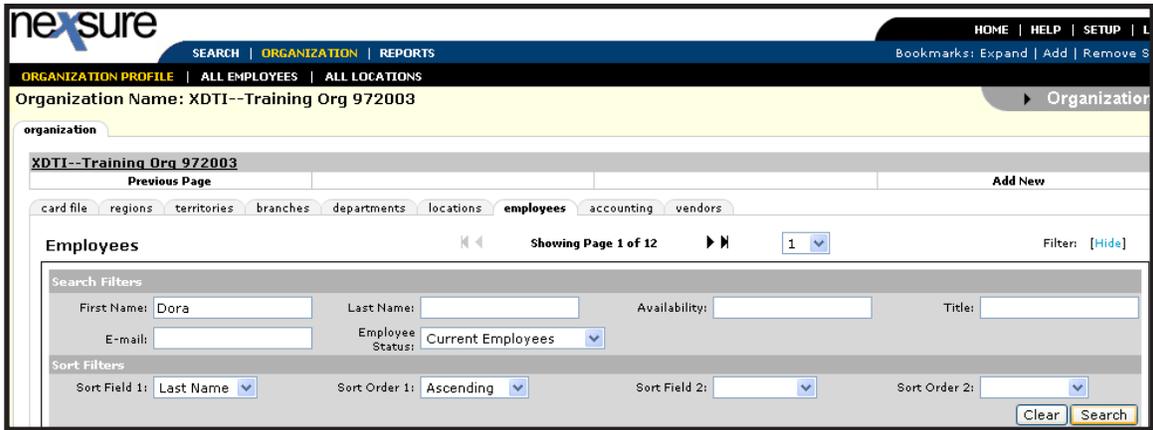
An employee's photo, signature and a salutation may be added to their **identity** in Nexsure. To access the employee **identity** tab after logging in, follow the steps below:

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

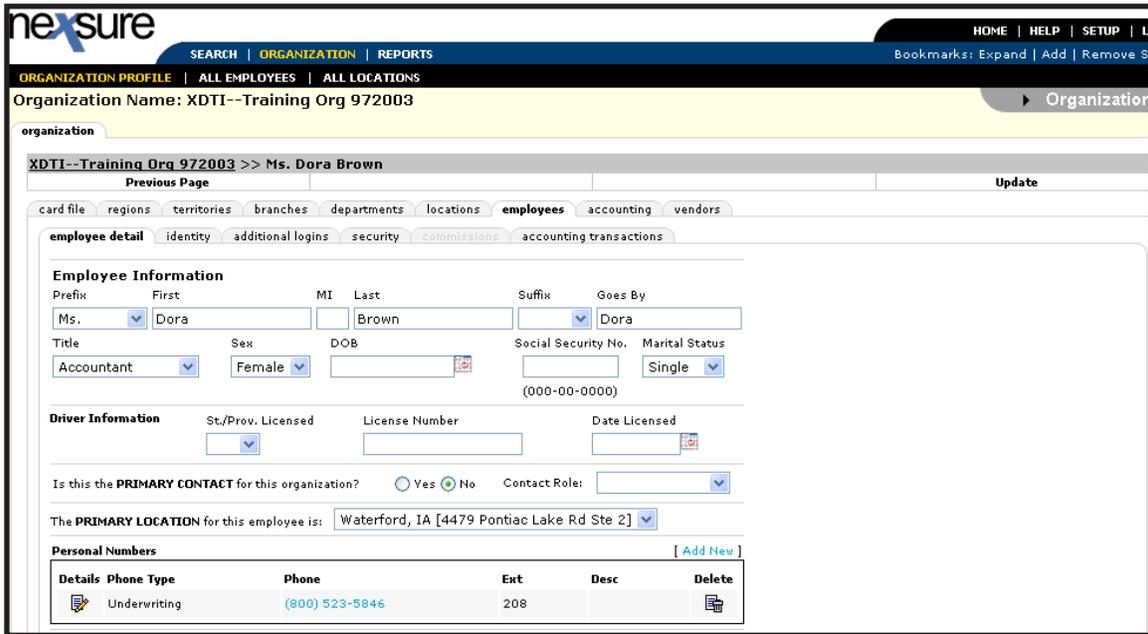


- Use the **[Show]** link to search for the specific employee by entering their first or last name and clicking the **Search** button to return results.

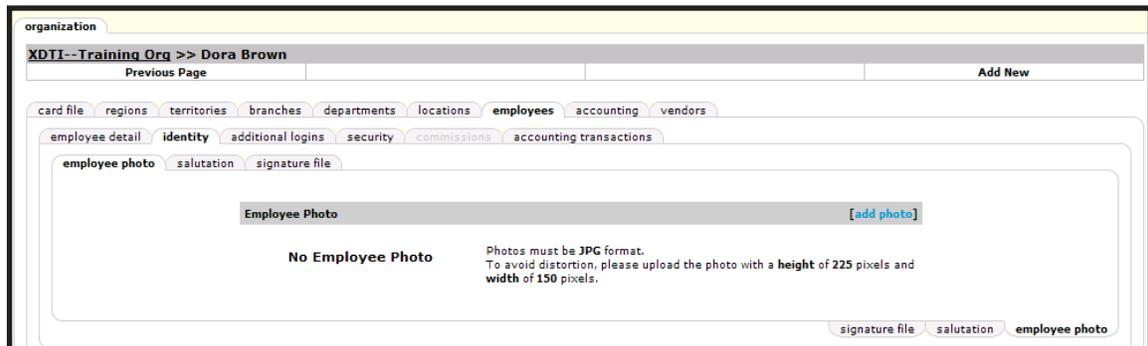
Note: All employees should be added at the Organization level no matter where security is added or not added. Adding at the Organization level ensures that all maintenance on the records is done at one level.



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



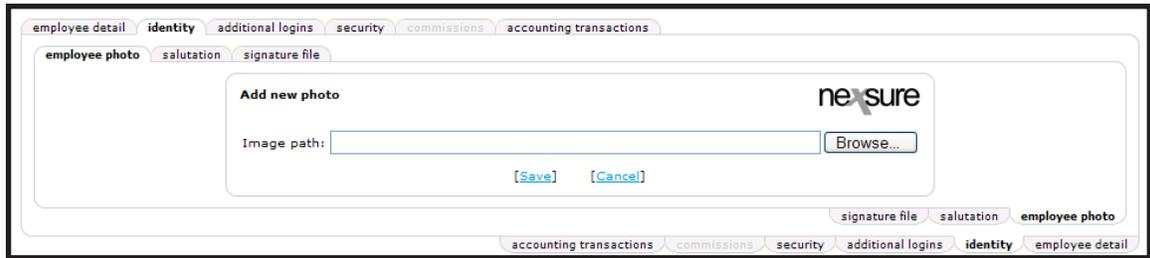
5. Click the **identity** tab to display tabs used for adding a photo, a salutation and a signature for the employee.



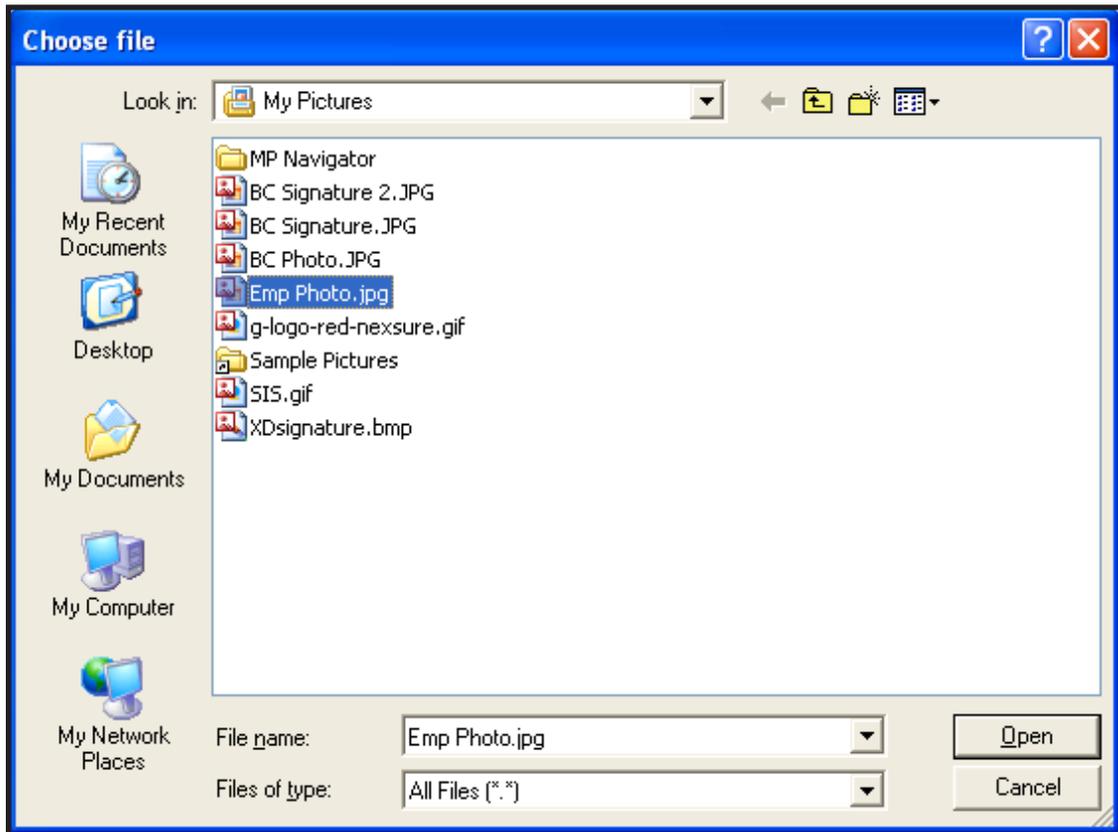
HOW to Add an Employee Photo

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.

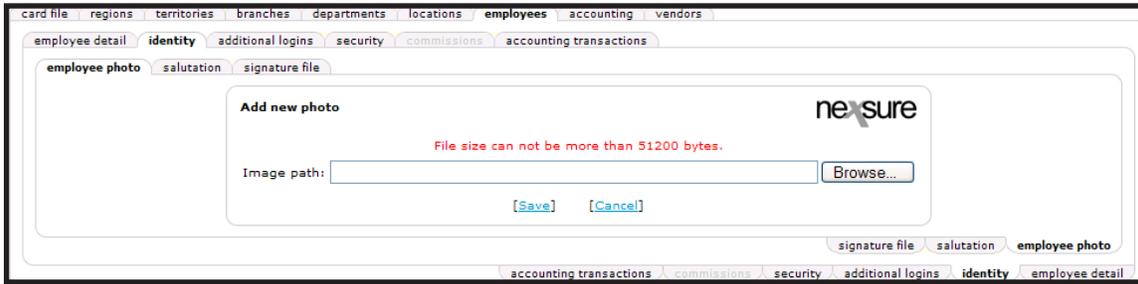
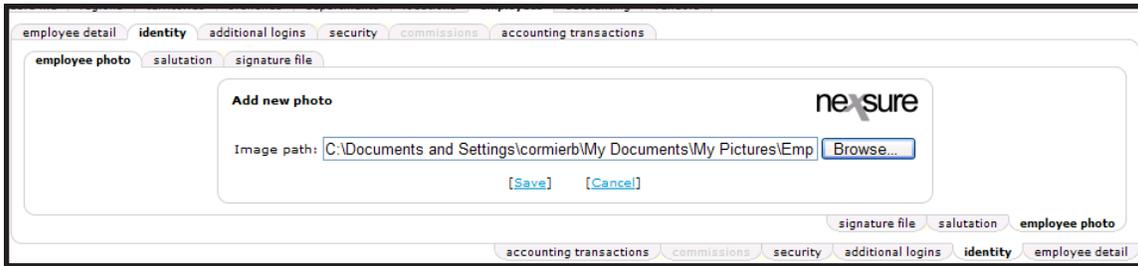
1. Click the **[add photo]** link on the **Employee Photo** tab of the Identity screen. Photos must be JPG format and to avoid distortion, upload the photo with a height of 225 pixels and width of 150 pixels and the file size cannot be larger than 50KB.
2. The **Add new photo** screen is displayed. Click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



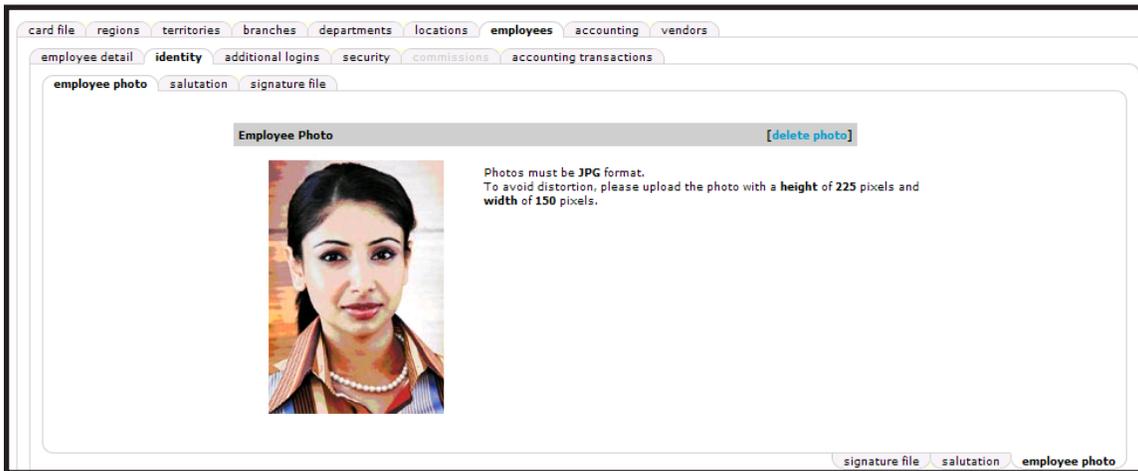
3. Search for the picture on your computer and after selecting the appropriate file, click the **Open** button to return to the **Add new photo** screen.



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.



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.

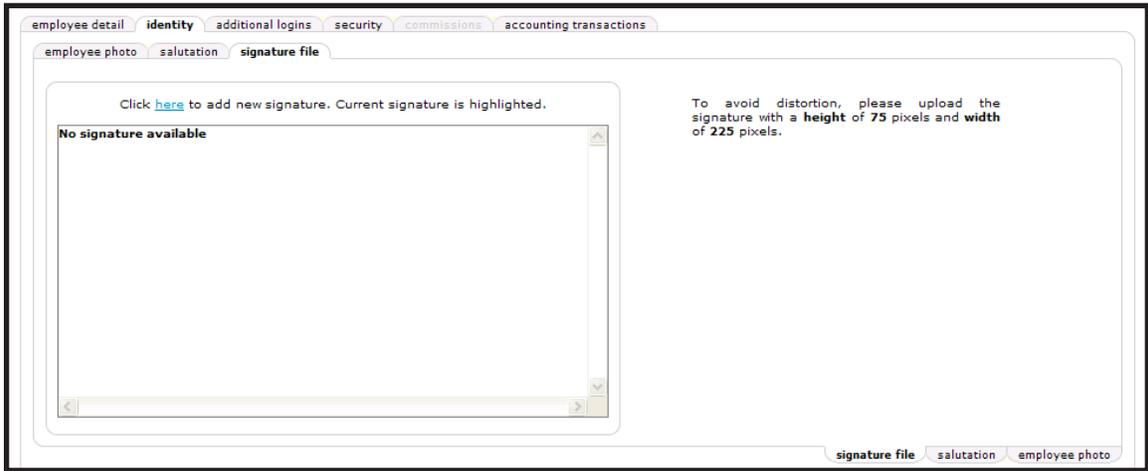


HOW to Add an Employee Signature

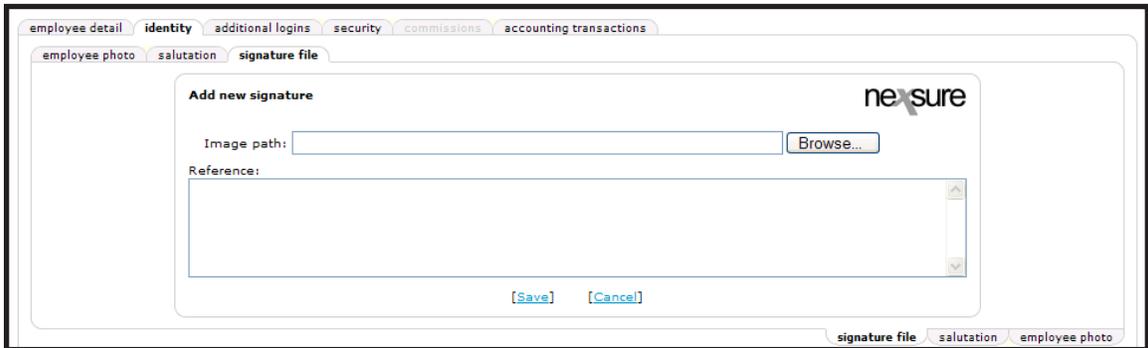
The employee’s electronic signature may be used on applications, policy change requests, loss notices, certificates and binders issued at the policy level. Electronic signatures may also be used in Documents created with or without a Template. The signature can be set up within a Document Template to 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 [here](#)** link to add a new signature. The **Add New Signature** screen is displayed.

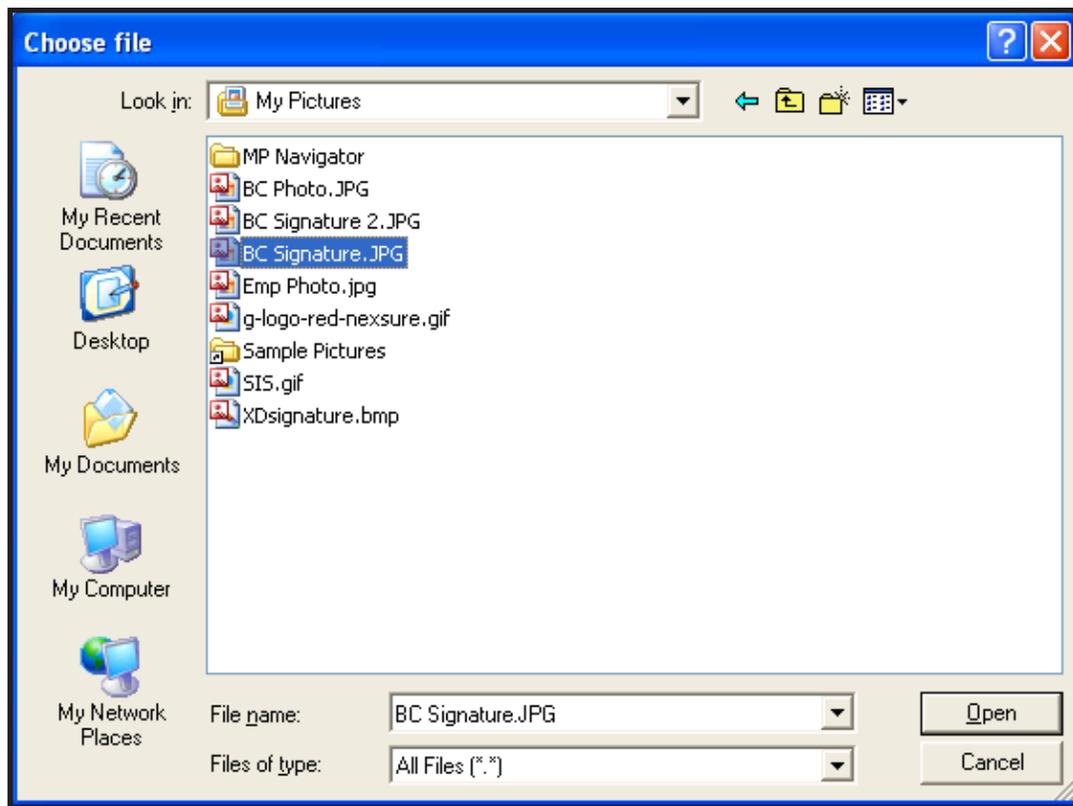
Note: The signatures must be JPG format and sized within a height of 75 pixels and a width of 300 pixels. For more information on setting up a digital signature see *Tips & Facts Vol. 3, Issue 3* in Nexsure Help.



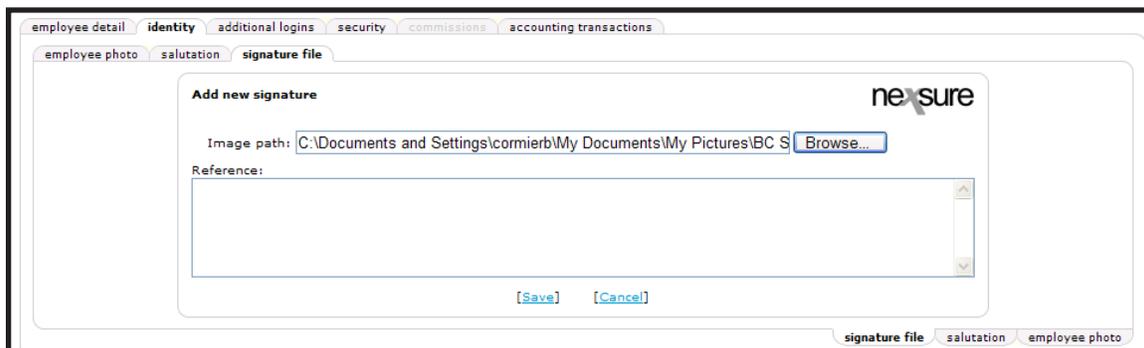
2. Click the **Browse** button to display the files on your local computer.



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

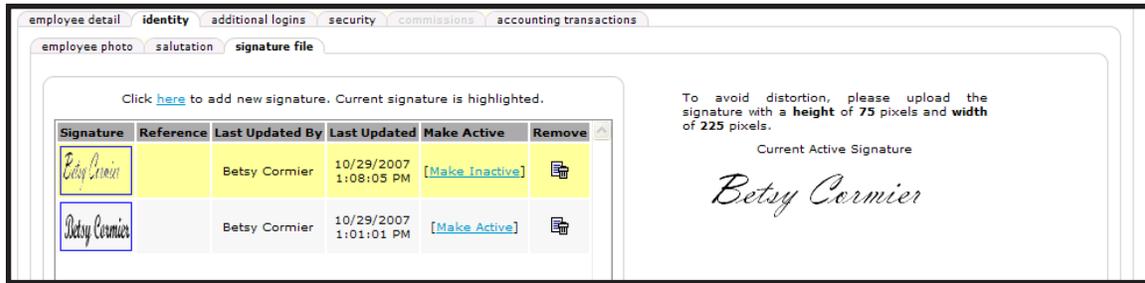


- The path to the file will be displayed in the **Image path** field. In the **Reference** box, enter any necessary reference information for the signature. Click **[Save]** to add the signature to Nexsure. Click **[Cancel]** to abort adding the signature.



- 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.



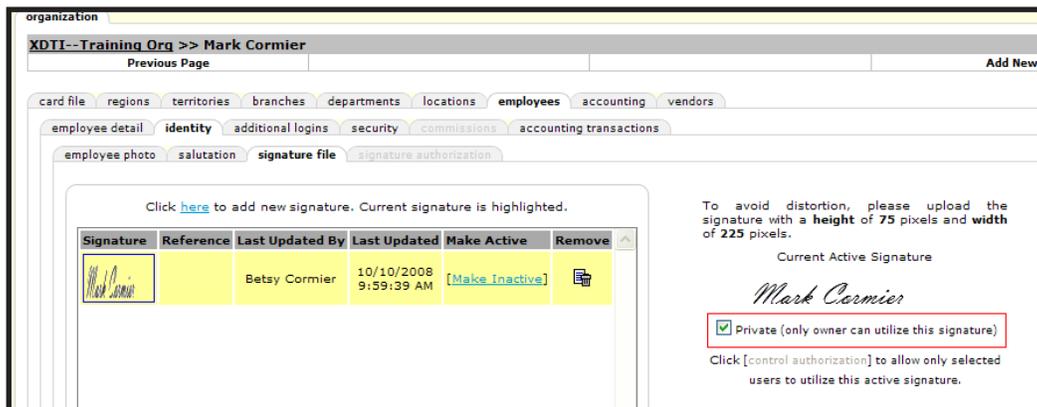
HOW to Secure an Employee Signature

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.

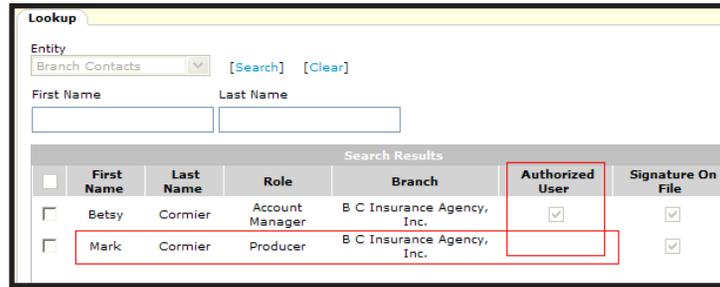


Note: All employees have access to their own signatures, regardless of authorizations.

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.

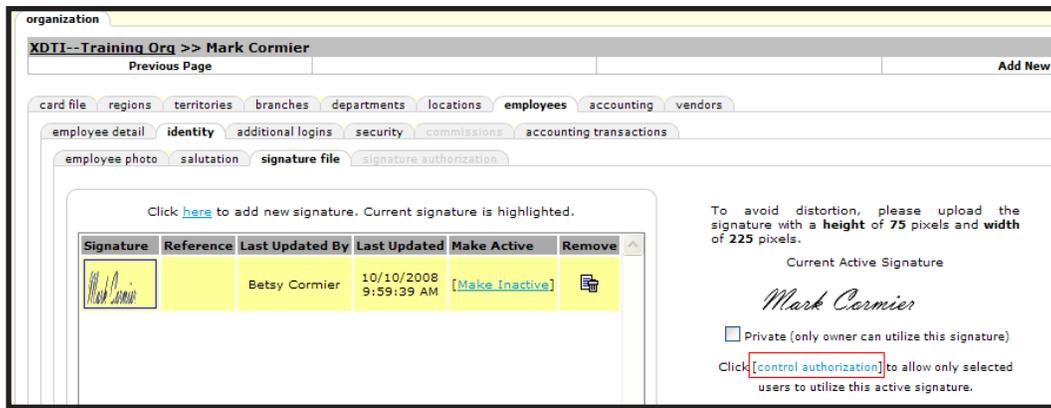
From the Producer section of the ACORD 125, a search for Producer Signature displays signatures available for employees assigned to the policy. If access to the signature is not authorized to the logged on user, the

signature will not pre-fill to the application.



Control Access of Employee Signature to Authorized Users

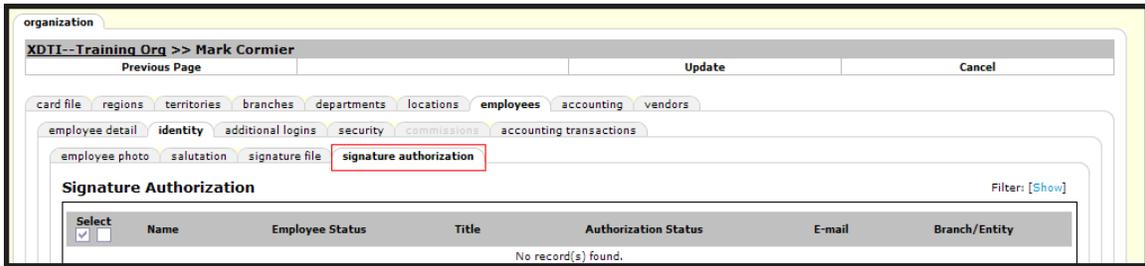
By default all users in an Organization will have access to the employee’s signature. From the employee’s **signature file** tab, click the **[control authorization]** link to limit access to specified users. If the check box next to **Private (only owner can utilize this signature)** is checked, uncheck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



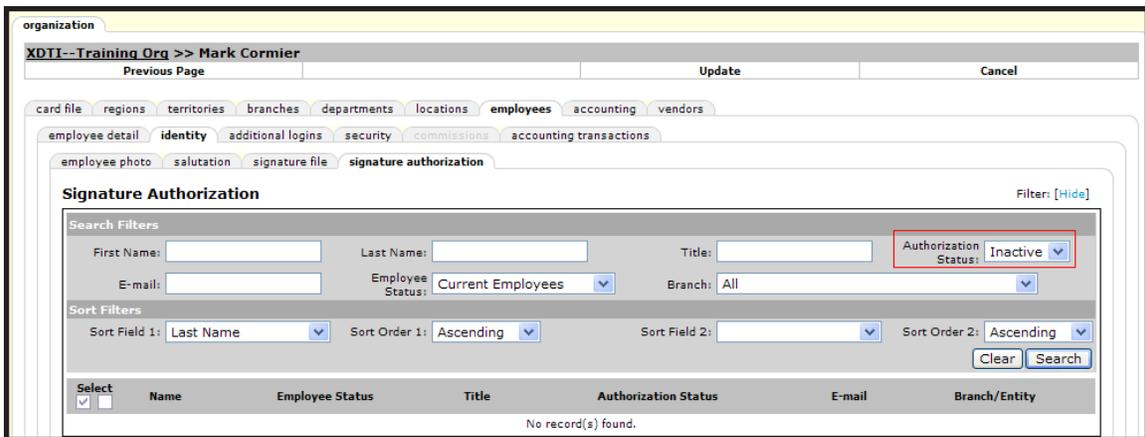
An alert message displays. Click **OK** to continue and control authorizations. **Cancel** will abort the authorization process.



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

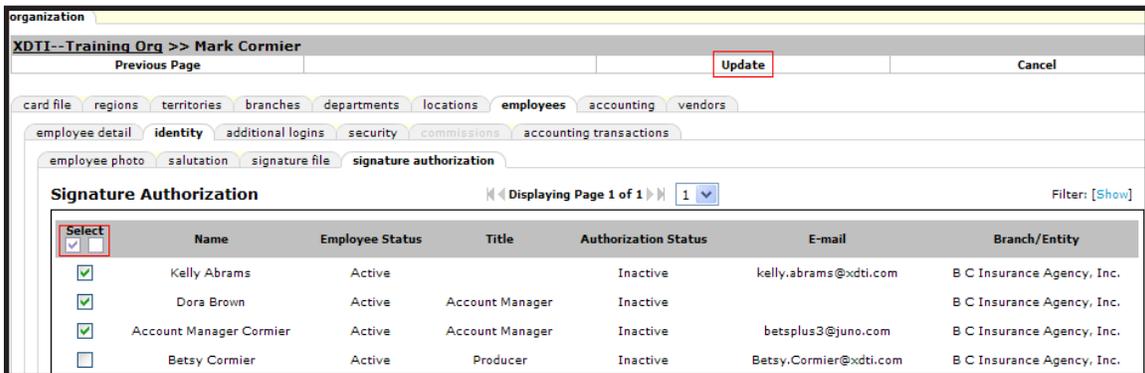


Active authorizations are users who have been authorized to use the employee’s signature. Click the **[Show]** link to search for users with an **Authorization Status** of **Inactive**. **Inactive** users are employees who have not previously been given authorization to use the employee’s signature.



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.



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



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”.



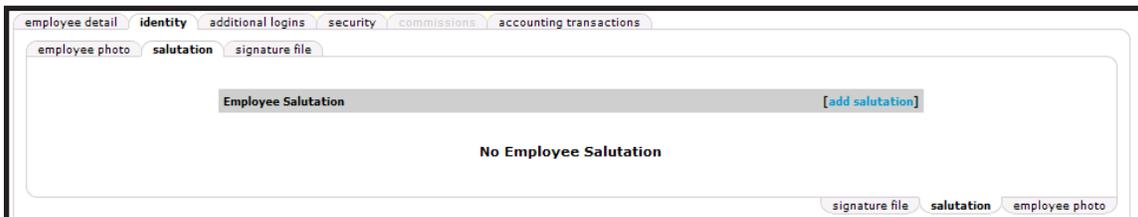
Update the list of authorized users from the **signature authorizations** tab. Use the filter to search for new employees to be given authorization or to remove authorization from individual employees.

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.



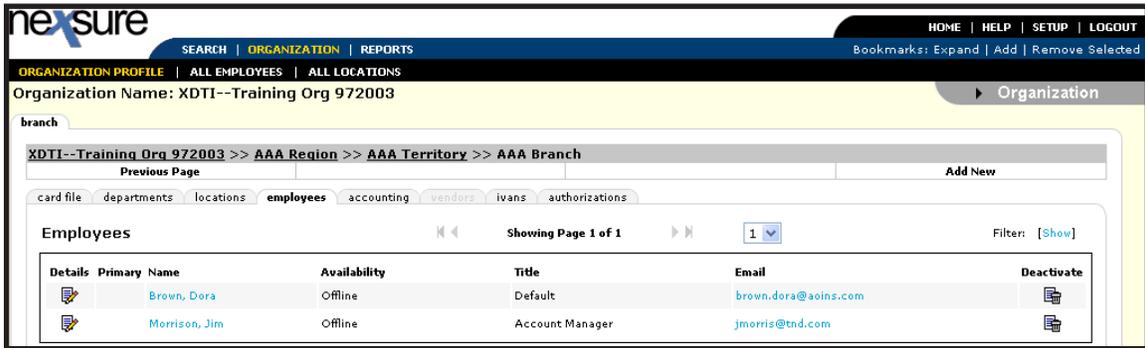
2. Enter the employee name in the **Name** field.
3. In the **Text** field enter the employee name and designations, Branch name, title, phone numbers, confidentiality statement, etc. Anything needed for an e-mail or fax document closing.
4. Click the **Save** link to store the information or **Cancel** to abort.
5. 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.

Reassigning Clients to Another Employee

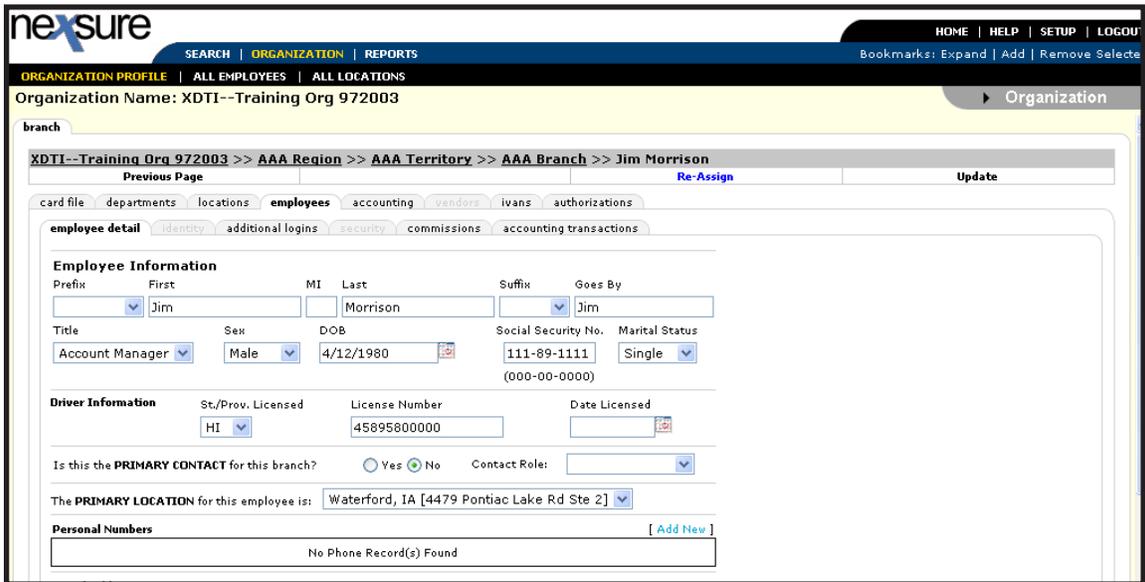
When employees are no longer employed with an organization, it is possible to reassign their clients to another employee that belongs to the same Branch. Using the reassign option will change the client and policy assignments as well as any open actions. History policies and their associated actions 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.



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



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.

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.

Select	Client Name ▲	Stage	Status	Type
<input checked="" type="checkbox"/>	Cormier Testing Services	Client	Active	Commercial
<input checked="" type="checkbox"/>	Kelly Travel	Client	Active	Commercial
<input checked="" type="checkbox"/>	McDonough Client	Client	Active	Commercial

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

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-Assignment Successful.

To re-assign more clients/policies from the same employee, select Re-assign.

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

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

[\[Re-Assign \]](#) [\[Next \]](#) [\[Cancel \]](#)

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


Please select the Responsibility needed to be re-assigned.

Producer

Please select the Responsibility to assign TO:

Account Manager

- Accountant
- 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?”

Re-Assign


Do you want to include all OPEN actions associated to the policies that are being reassigned?

Yes
 No

Do you want to change the employee on the Other Commissions section on unposted policy level invoices?

Yes
 No

[\[Previous \]](#) [\[Re-Assign \]](#) [\[Cancel \]](#)

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.

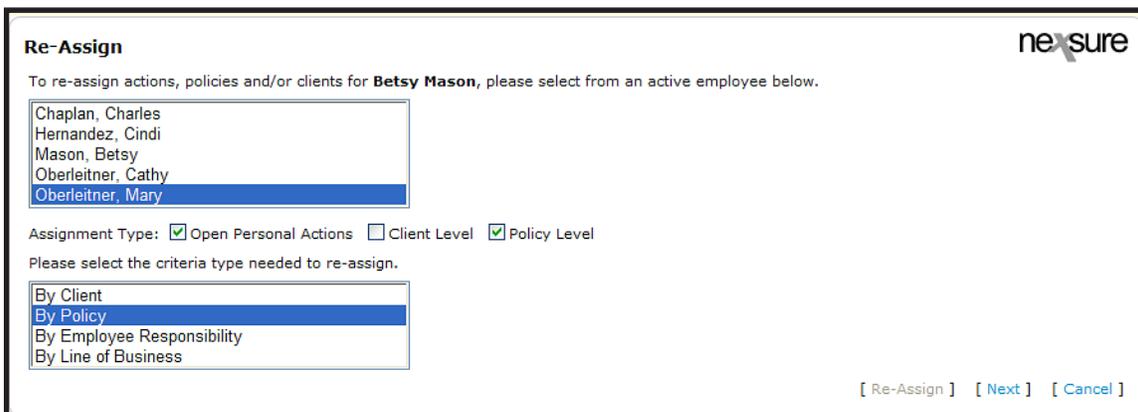
The confirmation for the re-assignment is displayed providing an option to continue with more **Re-assignments** or **Close**.



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**.



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
nexsure

Please select the policies needed to be re-assigned. Filters: [[Hide](#)]

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](#)

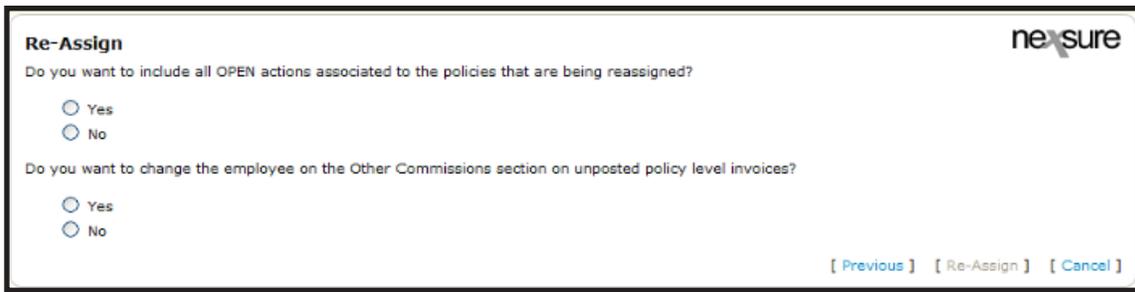
<input type="checkbox"/> Select	Policy No. ▲	Client	Stage	LOB	Status	Issuing Carrier
<input type="checkbox"/>	Aig1345	McDonough Client	Policy	Crime	In Force	AIG National Insurance Company
<input type="checkbox"/>	Aig1345	McDonough Client	Endorsement	Crime	Submitted	AIG National Insurance Company
<input type="checkbox"/>	Aig1345	McDonough Client	Endorsement	Crime	Submitted	AIG National Insurance Company
<input type="checkbox"/>	Aig1345	McDonough Client	Endorsement	Crime	Submitted	AIG National Insurance Company
<input type="checkbox"/>	Aig1345	McDonough Client	Endorsement	Crime	Pending	AIG National Insurance Company
<input type="checkbox"/>	Auto19734	McDonough Client	Policy	Auto - Commercial	In Force	AIG National Insurance Company
<input type="checkbox"/>	Auto19734	McDonough Client	Endorsement	Auto - Commercial	Submitted	AIG National Insurance Company
<input type="checkbox"/>	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?”



Re-Assign nexsure

Do you want to include all OPEN actions associated to the policies that are being reassigned?

Yes
 No

Do you want to change the employee on the Other Commissions section on unposted policy level invoices?

Yes
 No

[\[Previous \]](#) [\[Re-Assign \]](#) [\[Cancel \]](#)

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 nexsure

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.

Re-Assign


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 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 **Include 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:

Type:

Available Lines

401K - Group
 401K - Individual
 Accident - Individual
 AD&D - Group
 AD&D - Individual
 Advertising/Media Liability
 Aircraft - Commercial
 Aircraft - Glider
 Aircraft - Industrial Aid
 Aircraft - Non-Owned

Include Package Policies

For package policies, please select one of the following:

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

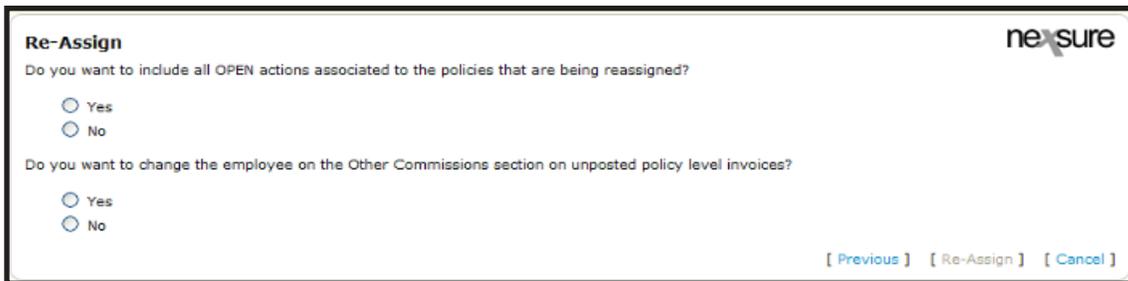
Lines of Business Selected:

[\[Previous \]](#) [\[Next \]](#) [\[Cancel \]](#)

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 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?"



Re-Assign nexsure

Do you want to include all OPEN actions associated to the policies that are being reassigned?

Yes
 No

Do you want to change the employee on the Other Commissions section on unposted policy level invoices?

Yes
 No

[Previous] [Re-Assign] [Cancel]

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 nexsure

Re-Assignment Successful.

To re-assign more clients/policies from the same employee,
select Re-assign.

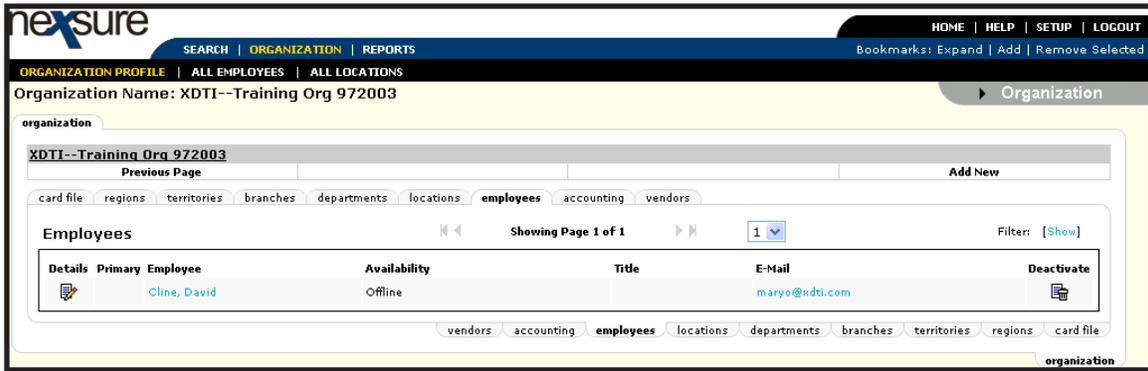
Re-Assign Close

Changing Employee Logins

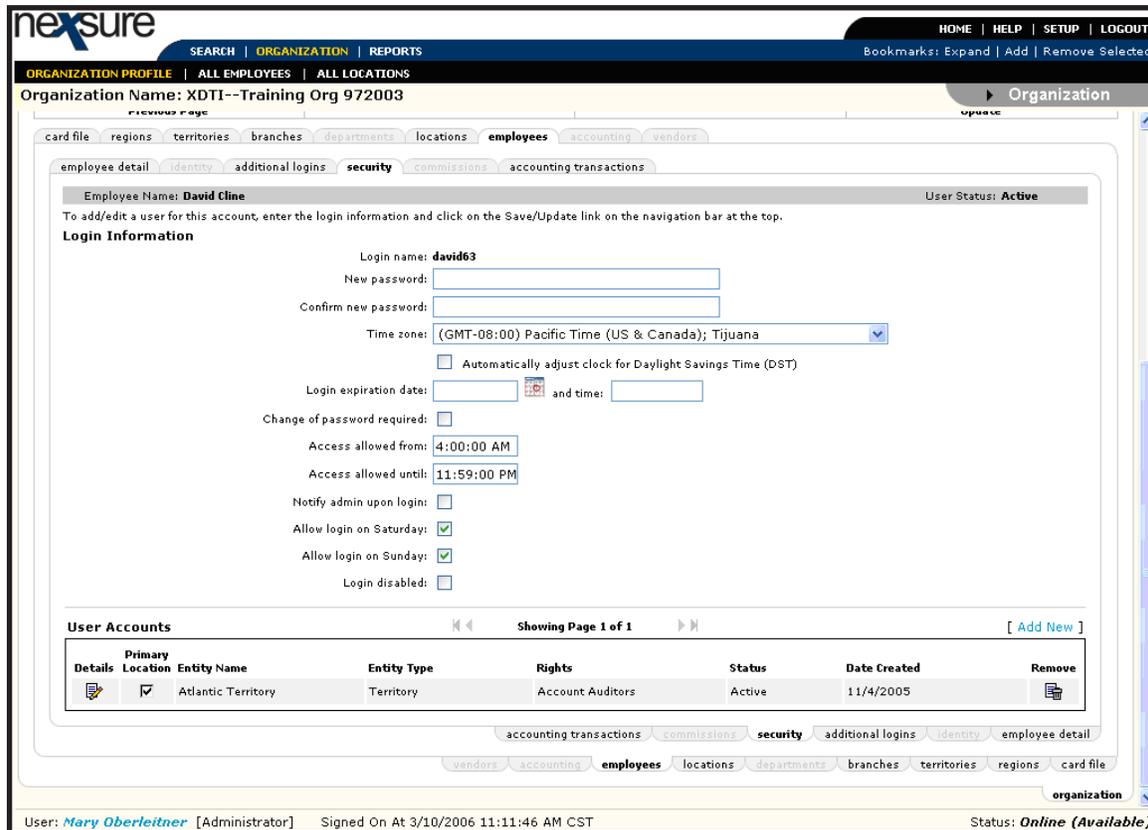
When an employee is married or divorced, or a company email provider is changed, it may be necessary to change a login ID. Make sure when changing login IDs to be consistent with the naming conventions used. Maintaining a set methodology ensures the login is unique and not already in use by someone else.

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.



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.

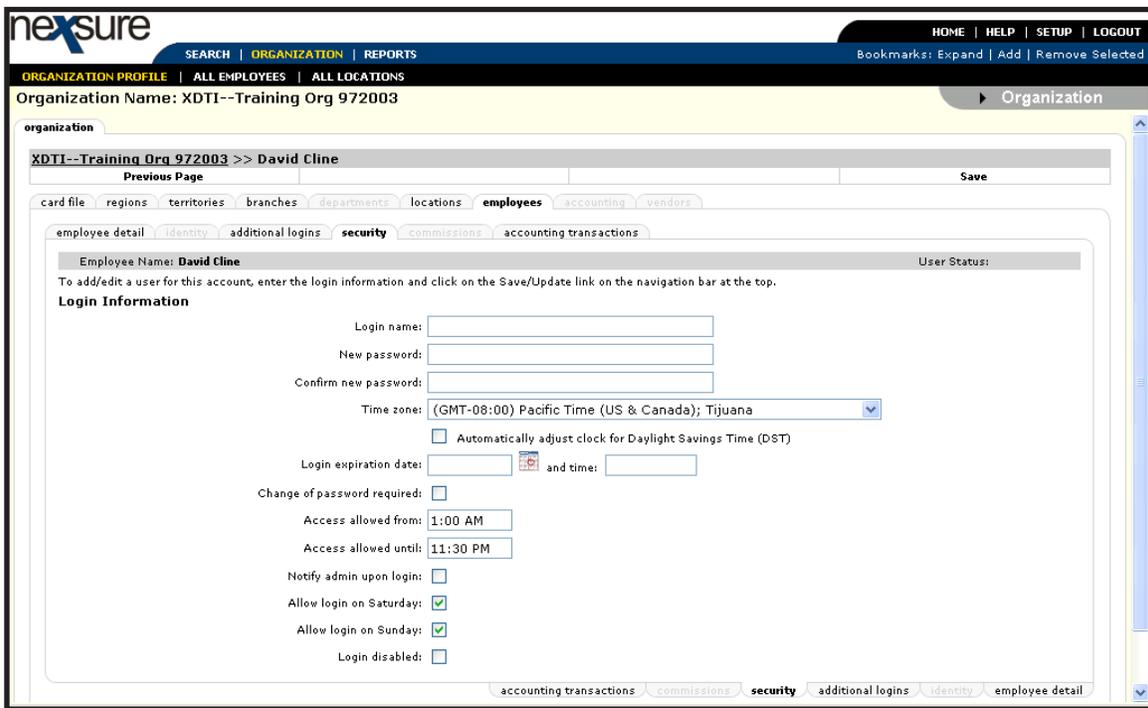


- Click **OK** to confirm the deletion of the record.



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

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



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

The screenshot shows the Nexsure web application interface. At the top, there are navigation links for SEARCH, ORGANIZATION, and REPORTS. The main header indicates the Organization Name: XDTI--Training Org 972003. Below this, there are tabs for organization profile, all employees, and all locations. The current view is for the employee David Cline, with a status of Inactive. The 'Security' tab is selected, showing fields for login name (dave@wdti), new password, confirm new password, time zone (GMT-08:00 Pacific Time (US & Canada); Tijuana), login expiration date, and access allowed times (1:00:00 AM to 11:30:00 PM). There are also checkboxes for 'Automatically adjust clock for Daylight Savings Time (DST)', 'Change of password required', 'Notify admin upon login', 'Allow login on Saturdays', 'Allow login on Sundays', and 'Login disabled'. A message at the bottom of the security section reads: 'No record(s) found. Click [here](#) to add security.'

9. Click the **No record(s) found. Click [here](#) 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.

The screenshot shows a dialog box titled 'User Rights Information' from the Nexsure application. The dialog contains the following fields and values: Entity Type: Organization, Entity Name: Atlantic Branch, Status: Active, and User Rights: Account Auditors. There are 'Cancel' and 'Add' buttons at the bottom right of the dialog. The dialog is displayed over a browser window showing the URL https://nexweb16.nexsure.com.

