# Chapter 4

# Actions Setup

### IN THIS CHAPTER

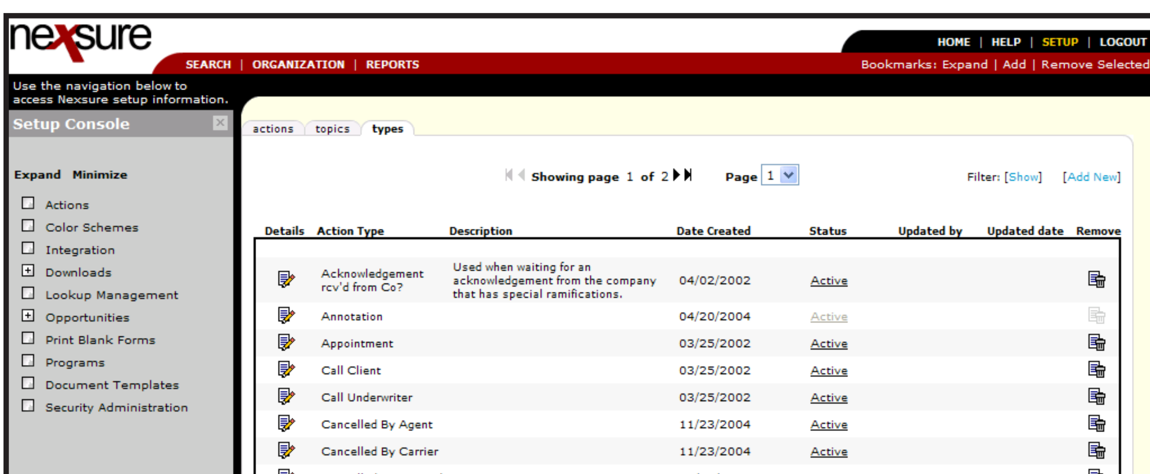
- Determining and Setting Action Types
- Determining and Setting up Action Topics
- Determining and Setting Up Action Triggers
- Determining and Setting Up Action Plans
- Associating Type to Topics

## Determining and Setting up Action Types

Actions are used as follow up reminders or to document something. Types are a default description clarifying the Action and are associated with Action Topics. The topic might be looked at as a group or category for the Action (reminder or documentation). **Types** are not unique and may be reused with any topic. Make sure when adding Action types not to repeat them since one is all that will be needed regardless of the number of associations.

Once an Action is added to a client, policy or for you personally, it cannot be removed. So, before adding the first Action to Nexsure either manually or automatically through the Policy Servicing page, it is best to determine what types will be important to your Organization. It is important to review the default list provided in your Organization and modify the types to fit your workflow. These types are global and will be used by all personnel at any level of the Organization.

- To access Action Type setup, click the **SETUP** link on the Utility menu. Click **Actions** on the Setup Console. Click the **Types** tab.



The Action types added to every Organization on creation can be found in the list below titled **Nexsure Action Type Defaults**. Take a look at these types and compare to your current workflow to determine what should be changed or added.

**Nexsure Action Type Defaults**

| Type | Icon | Considerations |
|---|---|---|
| **Acknowledgement rcv'd from Co?** | **General** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Annotation** | **Information** | *Annotation is used when Servicing policy requires that an Action be added. Not recommended for modification.* |
| **Appointment** | **Calendar** | *Appointment is used when moving Actions to Outlook Calendar to identify scheduled items.* |
| **Call Client** | **Phone** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Call Underwriter** | **Phone** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Cancelled By Agent** | **General** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Cancelled by Carrier** | **General** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Cancelled by Insured** | **General** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Check Status** | **Phone** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Create Meeting Agenda** | **Description** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Information needed** | **Information** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Legacy System** | **General** | *If items were converted from your previous system this type is used to identify them. Not recommended for modification.* |
| **Opportunity** | **Open Folder** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Payment Received?** | **Question mark** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |

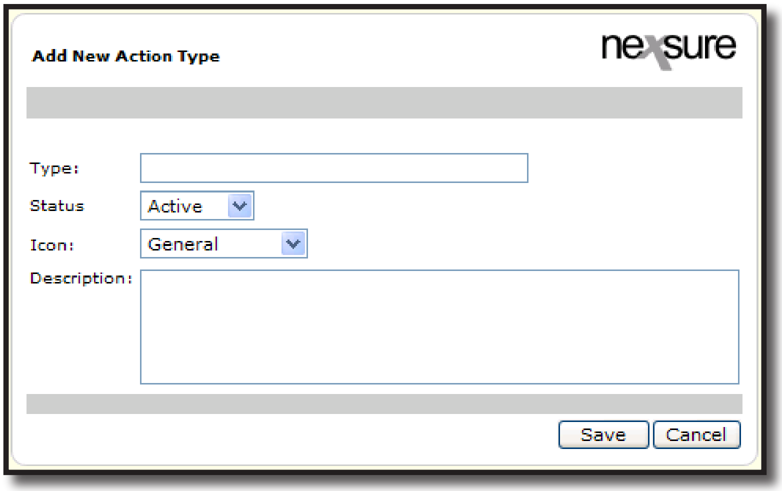
| Type | Icon | Considerations |
|---|---|---|
| **Policy Received?** | **Question mark** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Presentation** | **General** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Received from Carrier?** | **Question mark** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Received from Client?** | **Question mark** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **Submit to Carrier?** | **Information** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |
| **T-filed** | **Closed Folder** | *May be changed at anytime but modification will change all action types previously created. If no Actions created, the type may be removed or modified as needed.* |

## HOW to Add a New Action Type

Before adding new Action Types make sure to search making certain that one does not already exist.

- Click the **[Show]** link at the top of the summary page to display the Search filters.
- In the type field enter a few characters of the type to add. In the **Status** field, click the drop-down arrow to select **All** to include all active and inactive Action Types in your search results. Click the **Search** button.
- If there is no match add the new type. If there is a match, click the **Details**  icon to modify the Action Type if necessary. See “HOW to Modify an Existing Action Type” in this chapter.

To add a new **Type**, click the **Add New** link on the right at the top of the summary page to display the **Add New Action Type** pop-up window.




Enter text in the **Type** field. The text will display in a list for selection of an Action Type. **Status** defaults to Active. Click the **Icon** drop-down box to select an icon to display on the Action summary. The Icon list is not editable.

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**Note:** The type icon also determines how the action interacts with Microsoft Outlook synchronization. Assigning a type to a **Calendar** or **Phone** icon will synchronize the action with your Outlook Calendar. Assigning any other icon to the type will synchronize the action with the Outlook Task pad.

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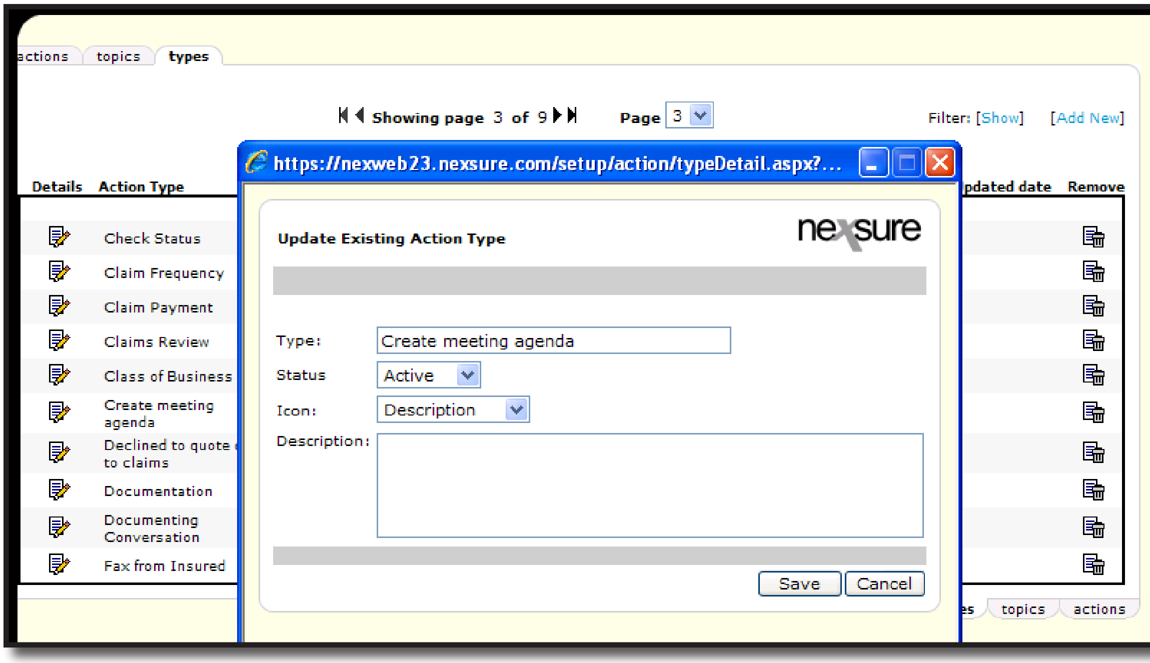
Enter a description in the **Description** field. The description will assist when revisiting the types for future additions. This description is for setup only and will not be displayed on the Action itself.


Click the **Save** button to complete the addition of the new **Type**. If **Cancel** is selected instead the addition is aborted.

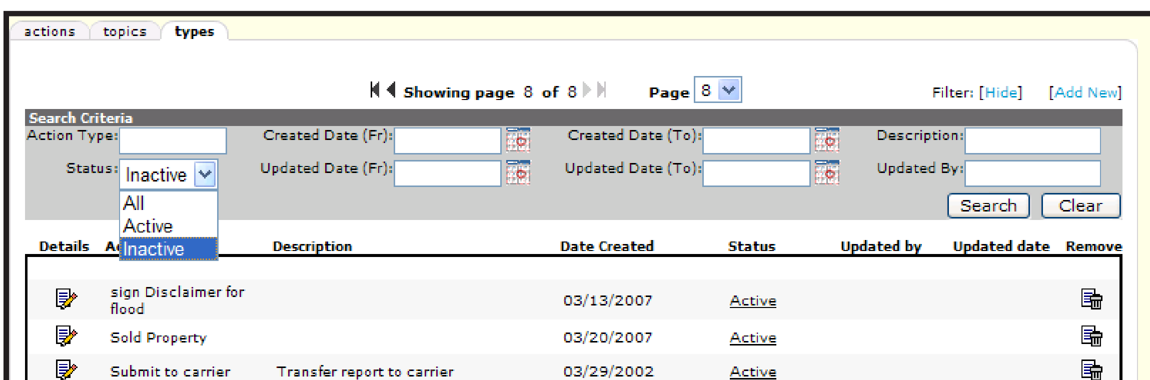
## HOW to Modify an Existing Action Type

After reviewing the list of default types, if it is decided that an existing Action Type should be modified to meet workflow needs, click the **Details** icon to display the Action Type. Make any modifications and click the **Save** button to keep the changes. Clicking the **Cancel** button will abort any changes.




**Note:** Altering Action types will not only affect newly added Actions, but will also alter existing actions including closed items.

An Action Type may also be modified to change its Status to **Inactive** so that it will not be available for selection when adding a new action. An Action Type that is **Inactive** may be modified and changed to an **Active** status. To locate an Inactive Action Type, click the **[Show]** link at the top of the summary page to display the Search filters. In the **Status** drop-down menu, select **Inactive** and click the **Search** button to display Inactive types. Click the **Details** icon of the Inactive type and change its Status to **Active**. Click the **Save** button to save changes or **Cancel** to abort changes.




**Note:** Any actions that were previously created using that type will remain unchanged. If an action type is **Inactive**, any active action topics with that type will still be displayed on the **actions** tab.

## Notes

## Determining and Setting up Action Topics

Topics might be looked at as a group or category for the Action (reminder). When determining what Action Topics should be added, first take a look at your workflow keeping in mind that a lot of what was previously tracked through an Action-like list is now tracked automatically on Nexsure's **Home** menu links. To avoid workflow duplication consider that Nexsure tracks all in-process: Opportunities, **Marketing Submissions**, **Binders**, **Edits**, **Audits**, **Expirations**, **Endorsements**, **Cancellations**, and **Claims**. As each item is moved to the next stage, posted or aborted they are automatically removed from Home page tracking without having to manage a separate Action. Actions are also used to document activity that is not created by Nexsure servicing, such as documenting a phone call.

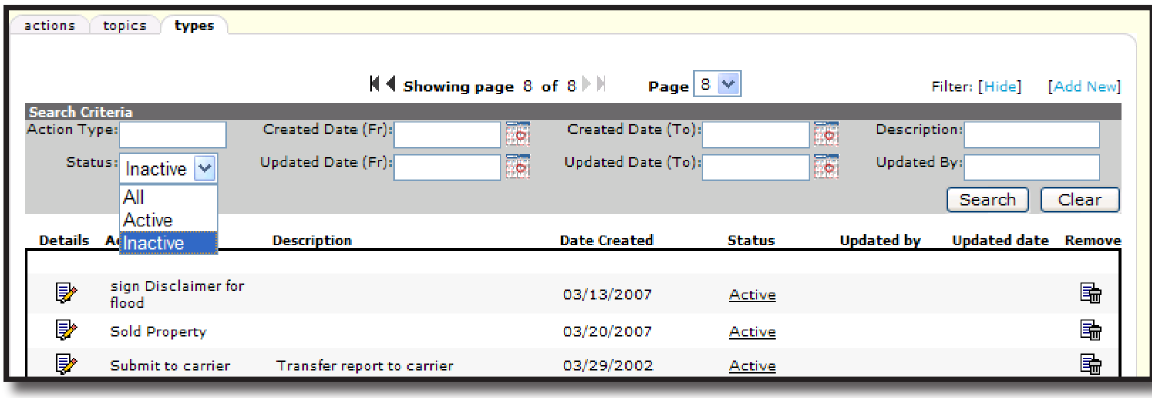
Below is the list of default Topics added to every new Organization upon creation. Take a look at the list and evaluate its need. Remove those that are not needed and add ones that will be important to your Organization. Once an Action topic has been added only the description may be modified.

**Nexsure Action Topic Defaults**

| Topic | Considerations |
|---|---|
| Activity | *If items were converted from your previous system this type is used to identify them. Not recommended for modification.* |
| Cancellation | *Used by Nexsure when adding a Cancellation. Cannot be removed.* |
| Claim | *Used by Nexsure when adding Claims. Cannot be removed.* |
| Endorsement | *Used by Nexsure when adding Endorsements. Cannot be removed.* |
| General Audit | *Used by Nexsure when adding Audits. Cannot be removed.* |
| Marketing | *Used by Nexsure when Marketing existing policies. Cannot be removed.* |
| Memo | *If items were converted from your previous system this type is used to identify them. Not recommended for modification.* |
| New Business | *Used by Interface when adding a new policy. Cannot be removed.* |
| Non-Renewal | *Used by Nexsure when identifying non-renewal policies. Cannot be removed.* |
| Note | *If items were converted from your previous system this type is used to identify them. Not recommended for modification.* |
| Policy Edit | *Used by Nexsure when adding Edits. Cannot be removed.* |
| Prospecting | *May be removed if not needed.* |
| Renewal | *Used by Nexsure when Renewing policies. Cannot be removed.* |
| Reporting Policies | *May be removed if not needed.* |

## HOW to Add Action Topics

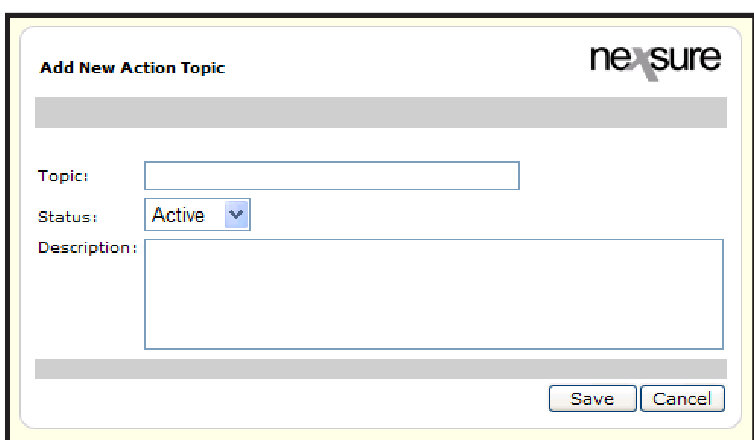
To add new Action Topics, click the **SETUP** link on the **Utility** menu. Click the **Actions** link in the **Setup Console**. Click the **topics** tab to display existing topics. Like types it is important to search for existing topics before adding new ones.




Make sure to search making certain that the topic being added does not already exist.

- Click the **[Show]** link at the top of the summary page to display the Search filters.
- In the topic field enter a few characters of the topic to add. In the **Status** field, click the drop-down arrow to select **All** to include all active and inactive Action Topics in your search results. Click the **Search** button.
- If there is no match add the new topic. If there is a match, click the **Details** icon to modify the Action Topic if necessary. Once a topic is added, only the **Status** and **Description** can be modified.

To add a new **Topic**, click the **Add New** link on the right at the top of the summary page to display the **Add New Action Topic** pop-up window.




Enter the new **Topic** and a description in the **Description** field. The description will assist when revisiting the topics for future additions. This description is for setup only and will not be displayed on the Action itself. The **Status** will default to **Active**.

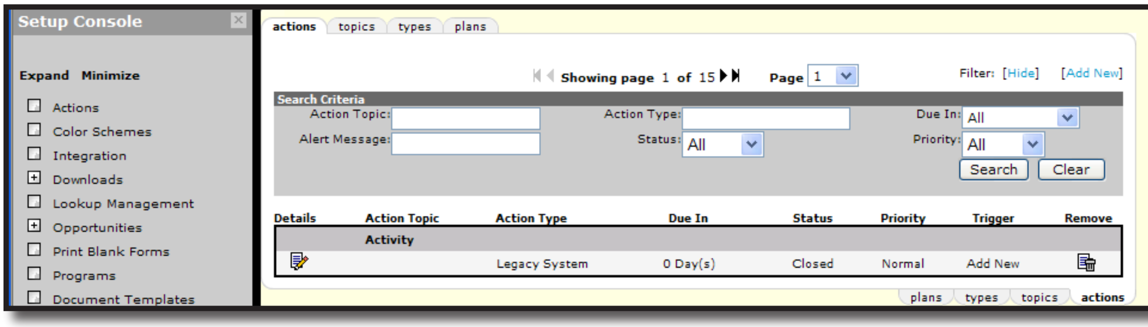
Click the **Save** button to complete the addition of the new **Topic**. If **Cancel** is selected instead the addition is aborted.

**Note:** Once a **Topic** is added only the **Description** and **Status** can be modified.

## Notes

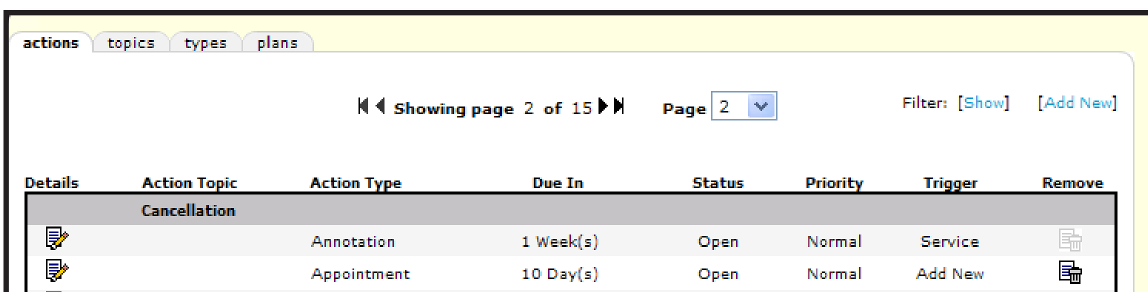
# Associating Type to Topics

In order to use newly added Types and Topics they must be associated to one another in an action. To associate Action Types to Topics, click the **SETUP** link on the Utility menu. Click **Actions** on the **Setup Console**. By default, actions are displayed by topic and the subcategorized by type. First use the Search Filter to look at the types already associated with Topics.

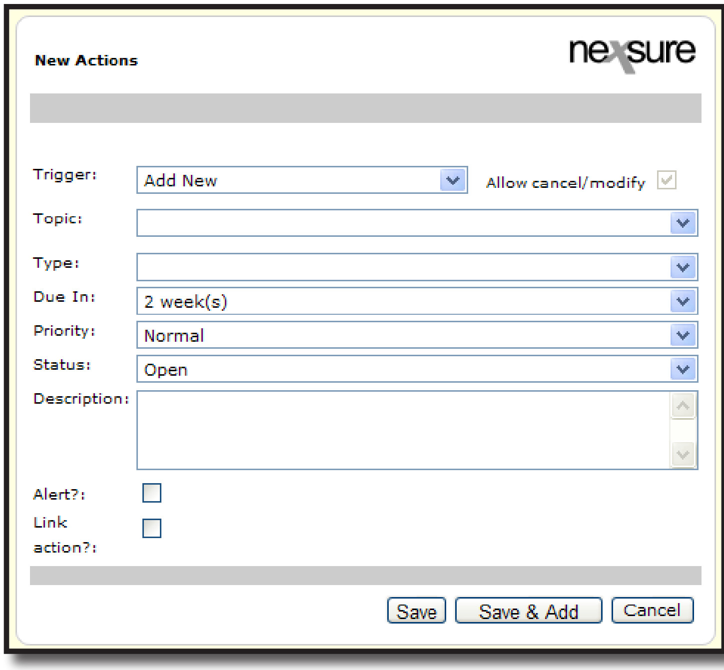



To search the list of associated Topics and Types:

- Click the **[Show]** link at the top of the summary page to display the Search filters.
- In the topic field enter a few characters of the topic or type and click the **Search** button to display the topic and associated types that contain your search criteria. Each search result will display on a separate page by **Action Topic** with its associated topics. Use the page navigation arrows to view each page.

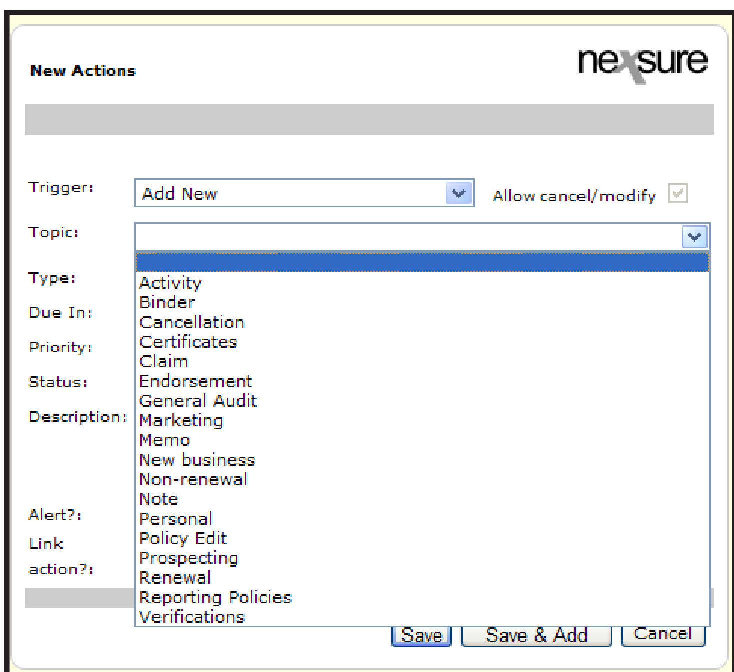



If there is no association found after searching or one needs to be added, click the **Add New** link on the right at the top of the summary page to display the **New Actions** pop-up window.

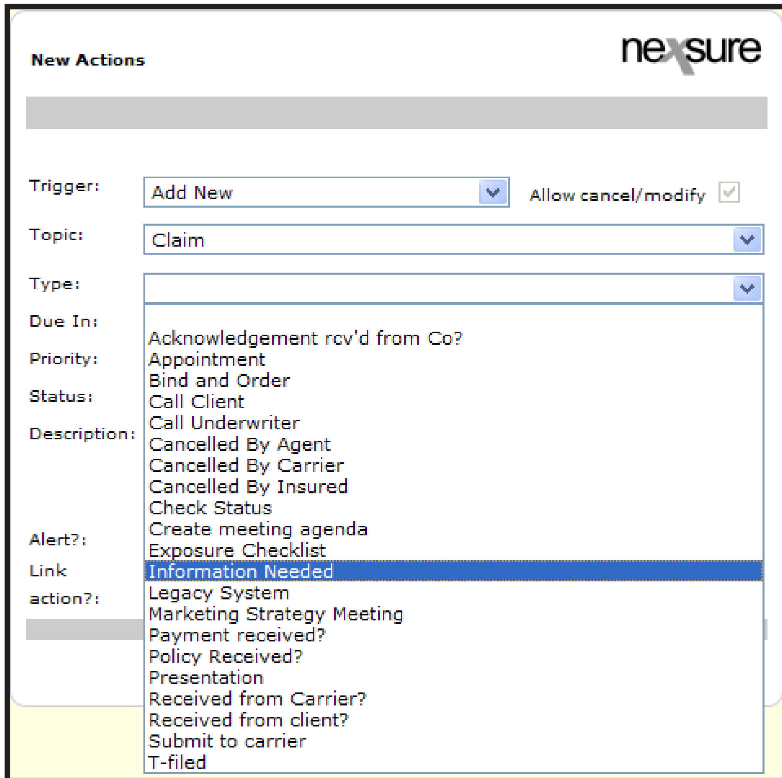



The **Trigger** selection default for a new action is **Add New**. Triggers create an action to be displayed when a policy is **In Forced** from a **Bound**, **Future**, **Expired** or **Marketing** stage. Action **Triggers** are optional. If this action is not to be used for a **Trigger**, do not change the **Add New** default. For information about setup of Action **Triggers**, see "Determining and Setting Up Action Triggers" later in this chapter.

Click the **Topic** drop-down box and choose the **Topic** the **Type** is to be associated with. If the **Topic** is inactive, the topic will not be available for selection when adding a new action.

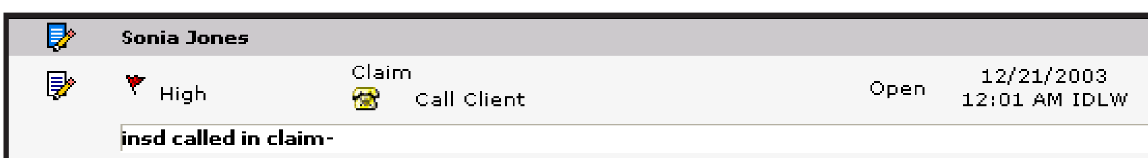


Click the Type drop-down box and select the type to be associated with the topic. If the **Type** is **Inactive**, the **Type** will not be available for selection when adding a new action.



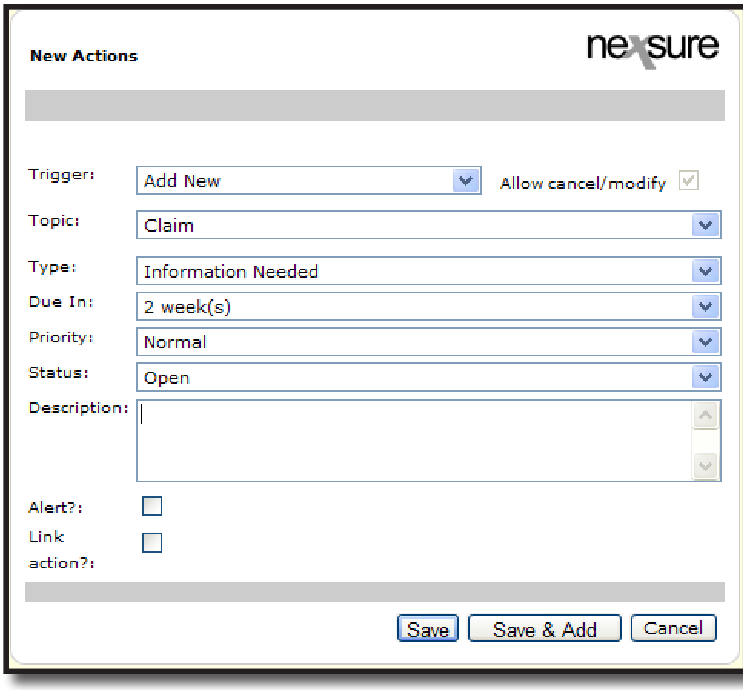

Click the **Due In** drop-down box to select the number of days the open action will generally be due in. Use the vertical scroll bar to select a number of days that may be out of view. The user will have the option to change the number of days on their action.

The **Priority** drop-down box has 2 choices – Normal and High. Selecting **High** will show the Action with a red flag indicating its importance. A normal priority has no icon.



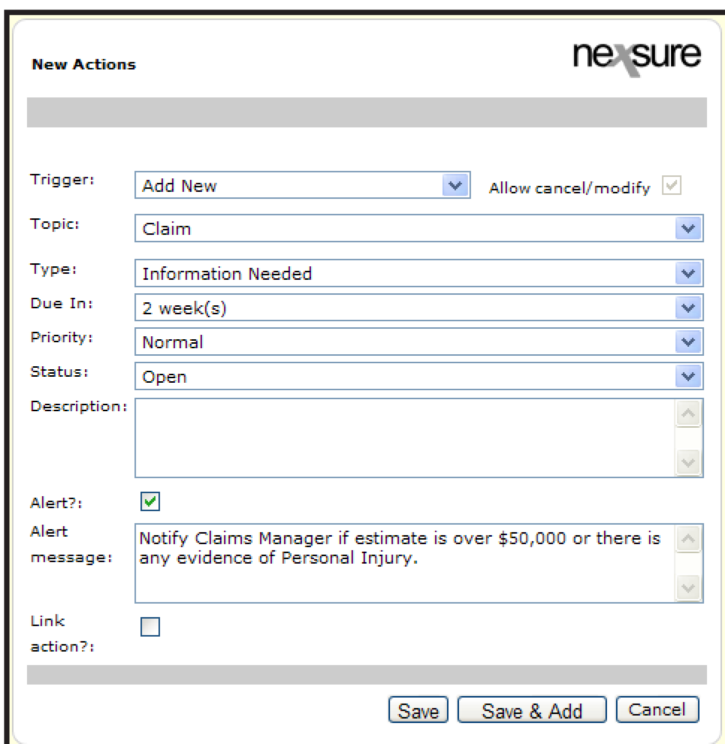


Set the status to **Open** if the Action requires a follow up or **Closed** if documentation only.

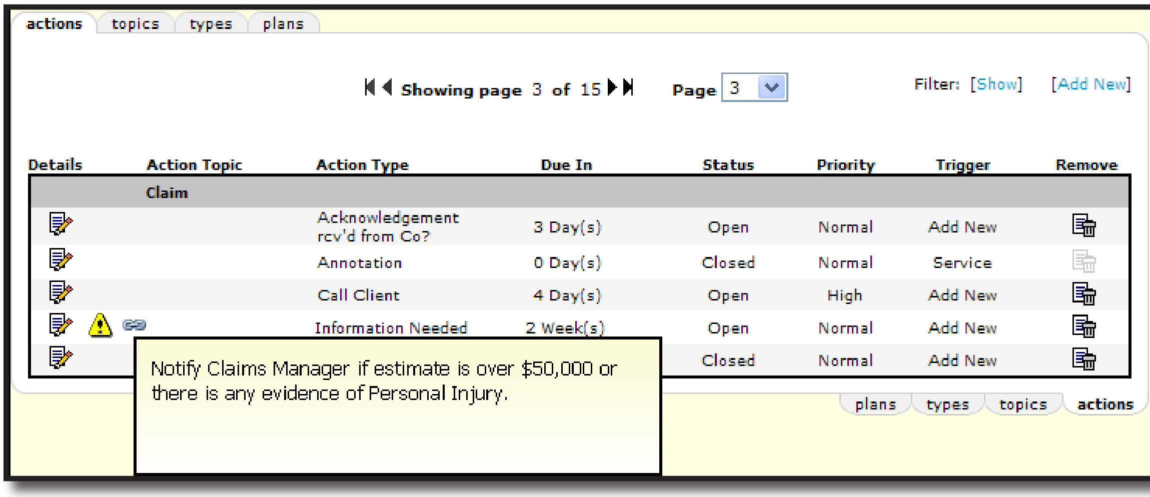



The Description field is only for this association to identify why it was added for future reference. It does not display on Actions added.

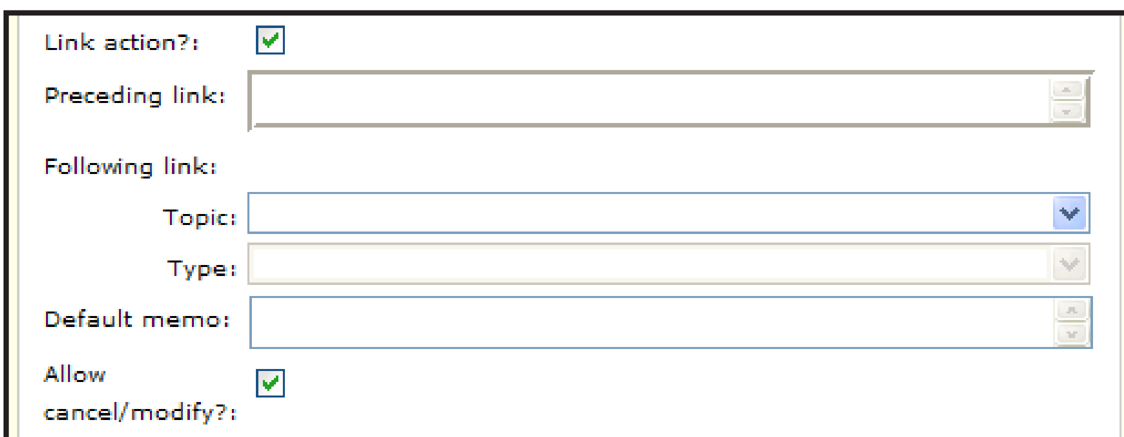
The setup of an action allows for an alert message to display when the action is being closed. Select the **Alert** check box to display an **Alert Message** box.



Enter a message up to 200 characters long to display when a staff member is closing the action. Once the alert is added to the action, an Alert icon is displayed next to the affected action when it is saved. From the **actions** tab, hold the mouse pointer over the **Alert** icon to display the message.




Actions may also be setup to open a subsequent action when the current action is closed. Select the **Link Action** check box to link the current action to a following predetermined action. Once the **Link Action** check box is selected, options display to identify the linked action that will follow the current action. Any action that was previously linked to the new action will display in the **Preceding link** box and cannot be modified at this point.

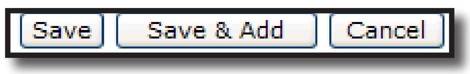


In the **Following link** area, the **Topic** and **Type** lists are available to select the topic and type for the action that is to follow the current action when it is closed. Once a **Topic** is selected, action types already associated with that topic are then available to select in the **Type** list. In the **Default memo** box, enter a memo up to 250 characters long to default in the resulting action memo section.

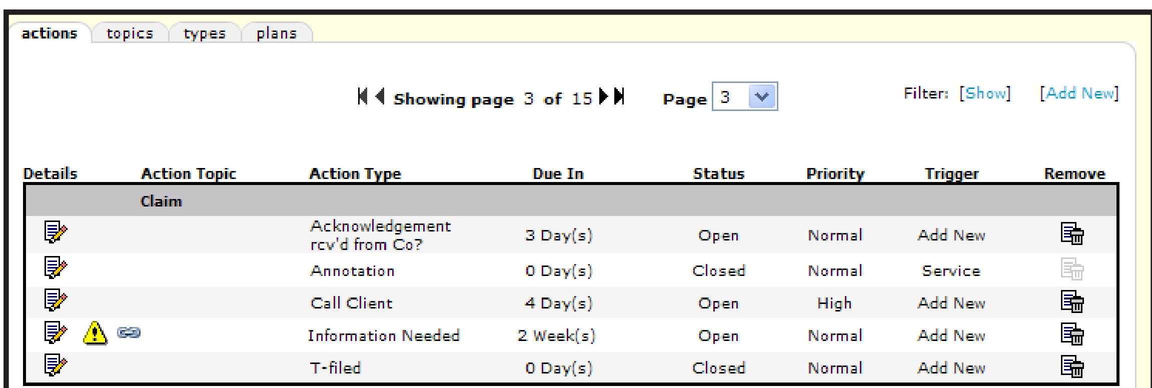
**Note:** Annotation action types cannot be linked as they are automatically added by Nexsure.

Select the **Allow cancel/modify ?** check box to enable the **Cancel**, **Topic** and **Type** options in the following action. When the linked action is displayed, the staff member must save the action. If the **Allow cancel/ modify ?** check box is not selected, the staff member will not be able to modify or cancel the following action.

Click **Save** to finish and add just this one association, or **Save & Add** to save this association and display a new **Add New** screen for another association. Click **Cancel** to abort the association.



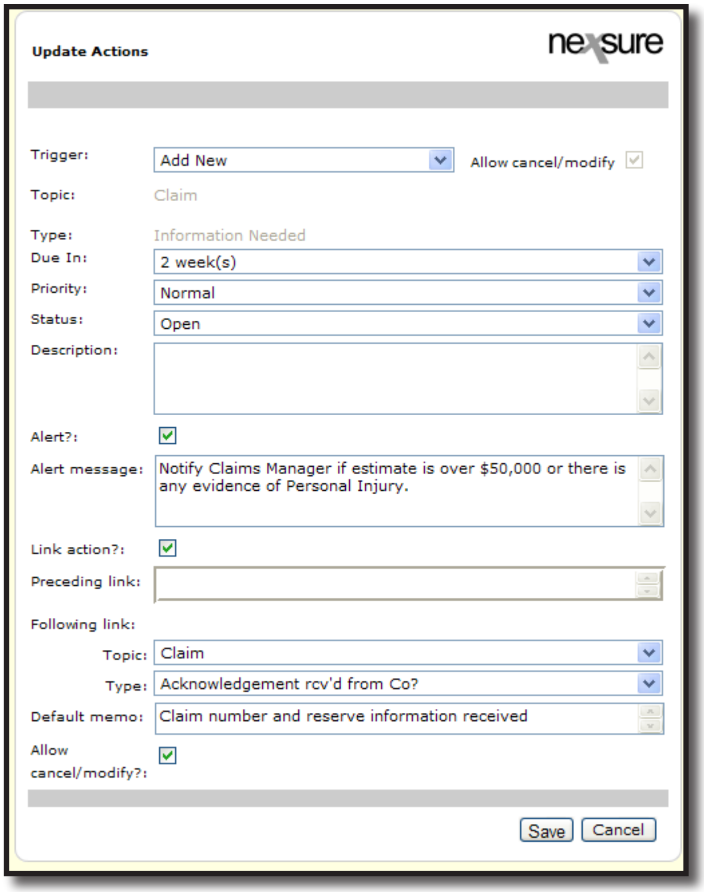

The new associated **Action Type** and **Topic** are displayed on the **actions** tab. A **Link** icon will display if the **Action Type** and **Topic** is linked to a following action. An **Alert** icon will display if an alert was added to the **Action Type** and **Topic**.




| Details | Action Topic | Action Type | Due In | Status | Priority | Trigger | Remove |
|---|---|---|---|---|---|---|---|
| | Claim | | | | | | |
| | | Acknowledgement rcv'd from Co? | 3 Day(s) | Open | Normal | Add New | |
| | | Annotation | 0 Day(s) | Closed | Normal | Service | |
| | | Call Client | 4 Day(s) | Open | High | Add New | |
| | | Information Needed | 2 Week(s) | Open | Normal | Add New | |
| | | T-filed | 0 Day(s) | Closed | Normal | Add New | |

## HOW to Modify an Action Type and Topic

To modify an **Action Type** and **Topic**, click the **SETUP** link on the **Utility** menu. Click **Actions** on the **Setup Console**. By default, actions are displayed by topic and then subcategorized by type. Click the **Details** icon of the **Action Type** and **Topic** you want to modify. The **Update Actions** screen displays.




The **Action Type** and **Topic** cannot be changed. An alert message may be changed by editing the text in the **Alert message** box. An alert message may be removed by clearing the **Alert?** check box. To remove a link between actions, clear the **Link action?** check box. The following action **Topic**, **Type** and **Default** memo may be changed. Click the **Save** button to save any changes or click **Cancel** to abort changes to the **Action Type** and **Topic**.

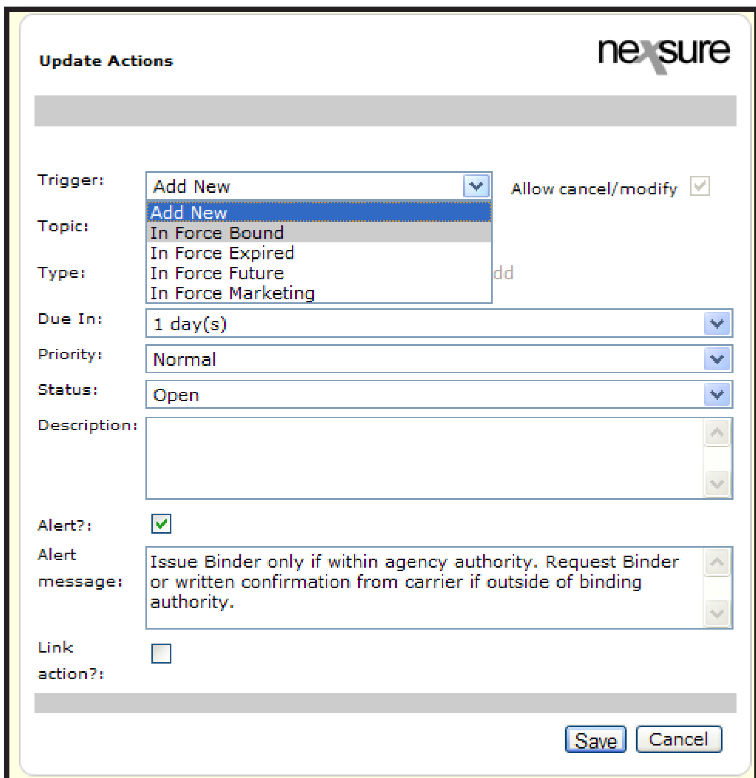
## Notes

## Determining and Setting Up Action Triggers

**Action Triggers** create an action when a policy is In Forced from a **Bound**, **Future**, **Expired** or **Marketing** stage. **Action Triggers** are optional. When a new action is created in **SETUP** by clicking **[Add New]** on the **actions** tab or an existing action is modified by clicking its **Details**  icon from the **actions** summary, the **Trigger** selection is displayed. For information on setting up new actions see "Associating Type to Topics" earlier in this chapter. For information on modifying an existing action see "HOW to Modify an Action Type and Topic" earlier in this chapter.

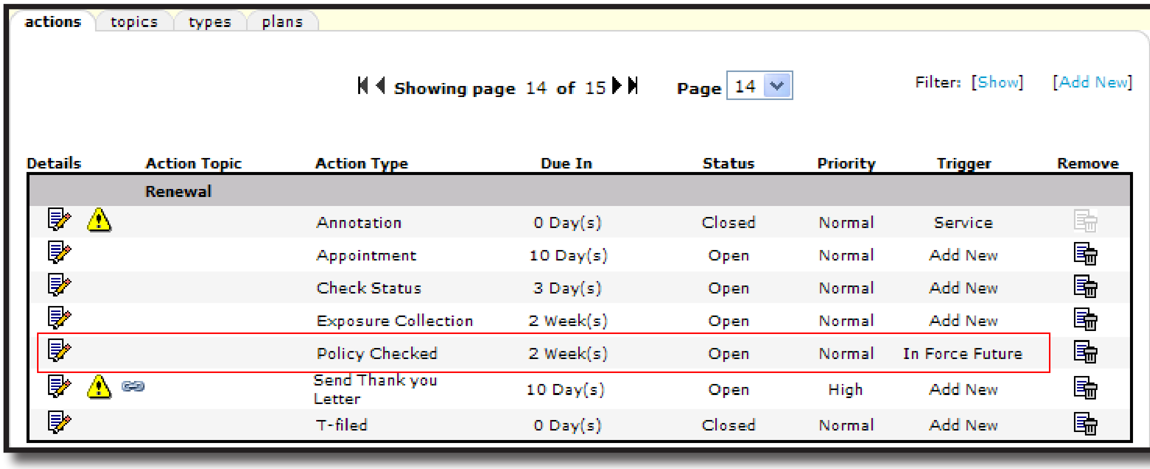
### HOW to Add an Action Trigger

From a new or existing action, click the **Trigger** drop-down box. The default selection is **Add New** indicating the action is not currently used as a **Trigger**. Action **annotations** used by Nexsure servicing cannot be used for trigger events. Select the desired **Trigger** option from the list. Each In Force **Trigger** option may be used only once in an Organization. If the option is already in use, the option will be highlighted in gray and may not be selected.



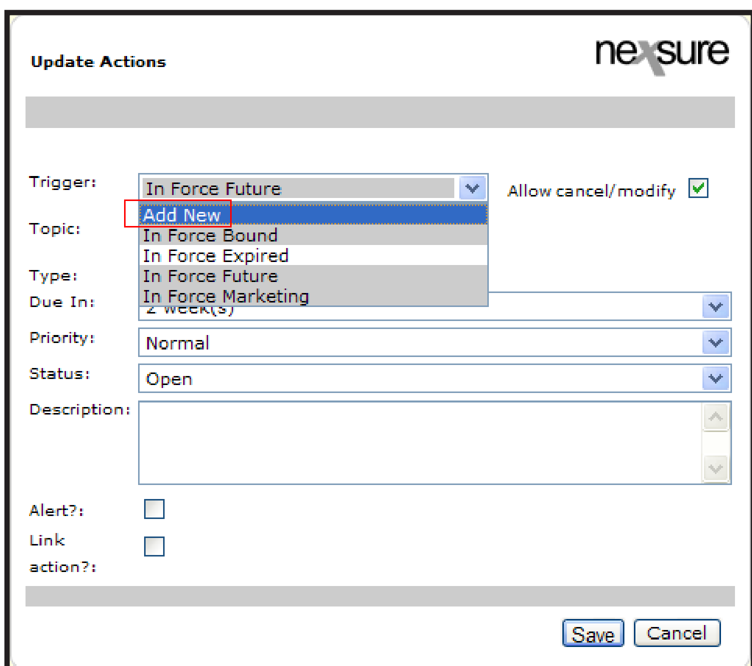

The **Allow cancel/modify** check box to the right of the **Trigger** selection controls whether the user may cancel or modify the **Topic/Type** of the action triggered when they click the **In Force** link. If the box is not checked when the action is setup, the **Cancel** button will be inactive and the **Topic** and **Type** boxes will be grayed out on the triggered action. If the **Allow cancel/modify** box is checked, the user will be able to cancel the triggered action and/or select a different **Topic** or **Type** on the triggered action.

Each Action **Topic/Type** combination may only be used for one **Trigger** event. Action **Triggers** are identified on the **action** tab summary under the **Trigger** column.




## HOW to Remove or Change an Action Trigger

To assign a trigger event to a different action, the trigger must first be removed from the existing action. To remove an action **Trigger**, locate the trigger event on the action tab summary. The trigger event is shown on the **Trigger** column. Click the **Details** icon of the action with the trigger event to be removed. From the **Trigger** drop-down list, select **Add New** to remove the trigger from the action. **Save** the action to remove the **Trigger** or **Cancel** to keep the **Trigger** event on this action.



When the **Trigger** event, **In Force**, **Bound**, **Expired**, **Future** or **Marketing**, is removed from an action it is available to select as the **Trigger** on another action. Actions that already have a **Trigger** event selected may not be used for a second **Trigger** event. For help adding the **Trigger** to a new action, see "HOW to Add an Action Trigger" earlier in this chapter.

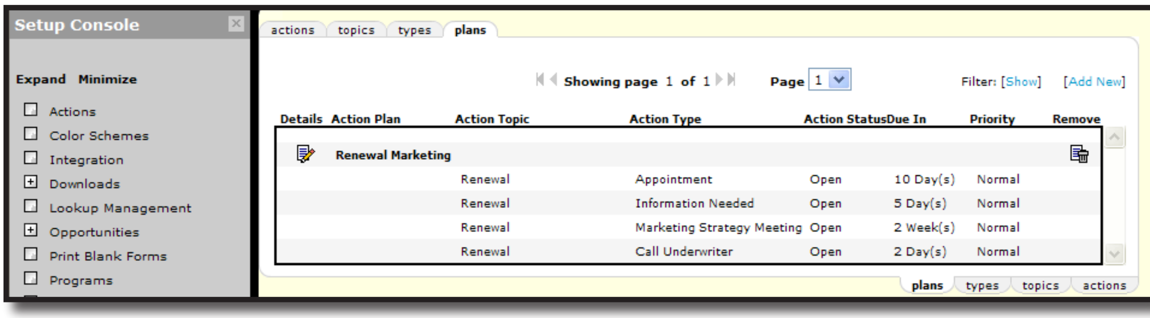
## Notes

# Determining and Setting Up Action Plans

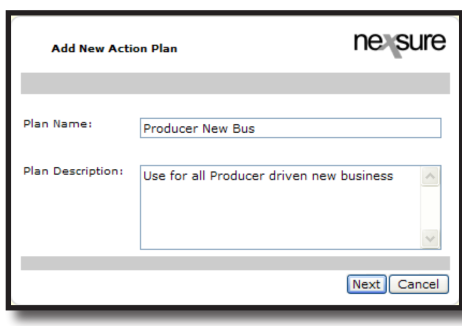
**Action Plans** are used to automate workflow and help document repetitious tasks by defining a series of actions with a plan. An organization may have multiple **Action Plans**. Prior to setting up a new **Action Plan**, all **actions** that will be used in the plan must exist. Actions from several different **topics** may be associated under one plan.

## HOW to Add an Action Plan

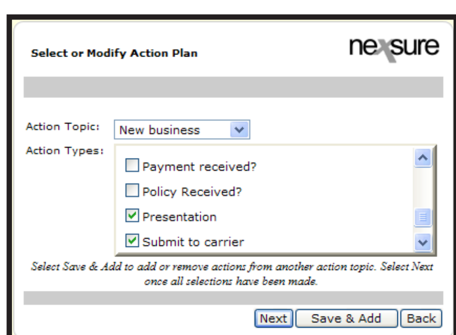
Click **SETUP** on the **Utility** menu. Click **Actions** on the **Setup Console**. Click the **plans** tab. Any existing **Action Plans** display in a summary view.




Click the **[Add New]** link to display the **Add New Action Plan** dialog box. Enter the **Plan Name** and a **Description** for the plan. The Name may be up to 20 characters long. The **Description** is limited to 50 characters.

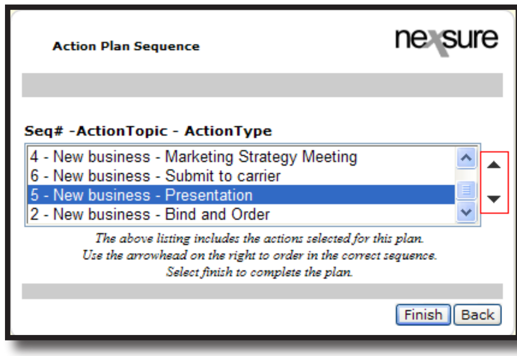



Click **Next** to select the actions that will make up the plan. In the **Select or Modify Action Plan** dialog box select the **Action Topic**. The associated **Action Types** are listed. Select each **Action Type** for the **Action Topic** that will be used in the plan. Use the vertical scroll bar to view all possible selections.

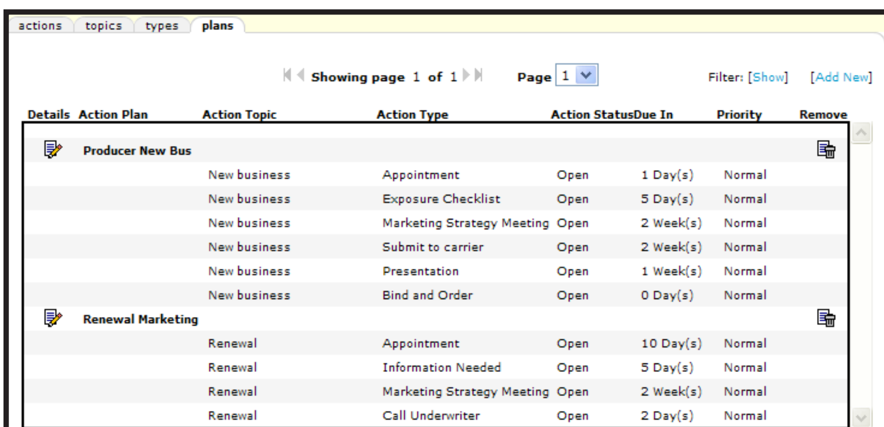


If the **Action Plan** will consist of actions under only the one **Action Topic**, click **Next**. If the **Action Plan** will include actions from another **Action Topic**, click **Save & Add** to save the selections from the first **topic** and continue to select the next **Action Topic** and all **Action Types** under that topic. When no further **Action Topic** selections need to be made, click **Next.**

The **Action Plan Sequence** dialog box displays. In the **Seq#** list, change the sequence of the actions if necessary. The sequence determines the default due date of open actions when the plan is added by the user. To change the sequence, highlight the action to move and use the up/down arrows to move the action. Click **Finish** when the sequence is correct.




The new action plan is added to the **plans** tab.



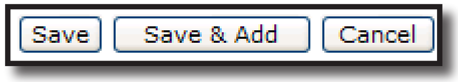

## HOW to Modify an Action Plan

Click the **Details** icon of the plan to change the name or associated actions. Changes to the plan will apply to plans added by users after the modification is saved. Existing plans are not changed.

Changes to the **Action Topics** and **Types** themselves automatically propagate to the plan.

## HOW to Remove Action Topics and Types

To remove an **Action Type** and **Topic**, click the **SETUP** link on the **Utility** menu. Click **Actions** on the **Setup Console**. By default, actions are displayed by topic and then subcategorized by type. Use the navigation link at the top of the page to view other pages. Click the **Remove** icon to delete the association of the **Action Topic** and **Type**. **Action Topics** used for **annotations** will not have an active **Remove** icon.




**Default Action Association List**

| Topic | Type | Days Due | Status | Priority |
|---|---|---|---|---|
| Activity | Legacy System | 0 | Closed | Normal |
| | | | | |
| Cancellation | Annotation | 7 | Open | Normal |
| | Appointment | 10 | Open | Normal |
| | Cancelled By Agent | 0 | Closed | Normal |
| | Cancelled by Carrier | 0 | Closed | Normal |
| | Cancelled by Insured | 0 | Closed | Normal |
| | Check Status | 15 | Open | Normal |
| | Payment Received? | 4 | Open | High |
| | Received from Carrier? | 27 | Open | Normal |
| | T-filed | 0 | Closed | Normal |
| | | | | |
| Claim | Acknowledgement rcv'd from Co? | 3 | Open | Normal |
| | Annotation | 0 | Closed | Normal |
| | Call Client | 4 | Open | High |
| | T-filed | 0 | Closed | Normal |
| | | | | |
| Endorsement | Annotation | 20 | Open | Normal |
| | Check Status | 25 | Open | Normal |
| | Information needed | 10 | Open | Normal |
| | Received from Carrier? | 30 | Open | Normal |
| | T-filed | 0 | Closed | Normal |
| | | | | |
| General Audit | Annotation | 0 | Closed | Normal |
| | Call Client | 4 | Open | Normal |
| | Call Underwriter | 3 | Open | Normal |
| | Information Needed | 4 | Open | Normal |
| | Payment received? | 5 | Open | Normal |
| | Received from Carrier? | 120 | Open | Normal |
| | T-filed | 0 | Closed | Normal |
| | | | | |
| Marketing | Annotation | 0 | Closed | Normal |
| | Mass Marketing | 30 | Closed | Normal |
| | Opportunity | 0 | Closed | Normal |
| | | | | |
| Memo | Legacy System | 0 | Closed | Normal |
| | | | | |
| New Business | Annotation | 0 | Closed | Normal |
| | Appointment | 1 | Open | Normal |
| | Call Client | 3 | Open | Normal |
| | Call Underwriter | 3 | Open | Normal |
| | Check Status | 5 | Open | Normal |

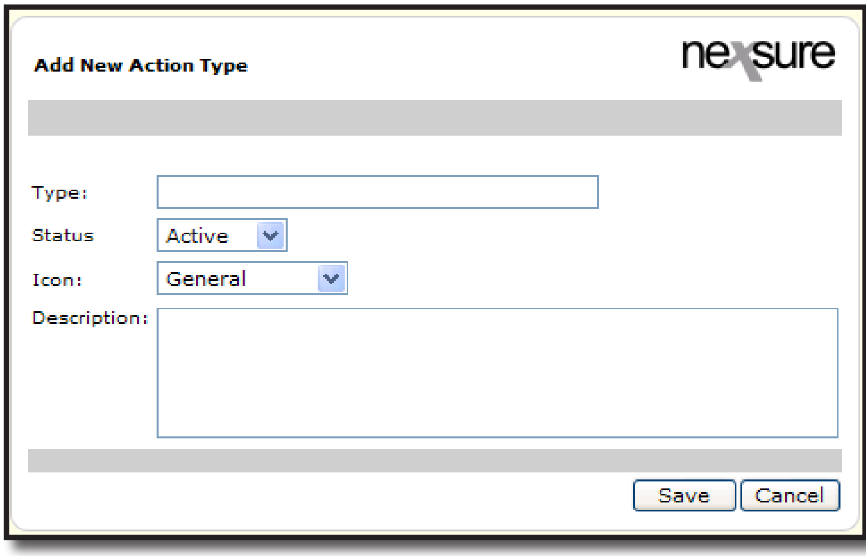
| Topic | Type | Days Due | Status | Priority |
|---|---|---|---|---|
| | Information needed | 3 | Open | Normal |
| | Payment received? | 3 | Open | Normal |
| | Policy received? | 27 | Open | Normal |
| | T-filed | 0 | Closed | Normal |
| | | | | |
| Non-Renewal | Annotation | 0 | Closed | High |
| | Appointment | 0 | Closed | Normal |
| | | | | |
| Note | Legacy System | 0 | Closed | Normal |
| | | | | |
| Personal | Appointment | 0 | Open | Normal |
| | | | | |
| Policy Edit | Annotation | 0 | Closed | Normal |
| | | | | |
| Prospecting | Call Client | 0 | Open | Normal |
| | Presentation | 0 | Open | Normal |
| | | | | |
| Renewal | Annotation | 0 | Closed | Normal |
| | Appointment | 10 | Open | Normal |
| | Call Client | 3 | Open | Normal |
| | Call Underwriter | 2 | Open | Normal |
| | Check Status | 3 | Open | Normal |
| | Information needed | 5 | Open | Normal |
| | Payment received? | 5 | Open | Normal |
| | Policy received? | 27 | Open | Normal |
| | T-filed | 0 | Closed | Normal |
| | | | | |
| Reporting Policies | Call Client | 7 | Open | Normal |
| | Call Underwriter | 4 | Open | Normal |
| | Information needed | 4 | Closed | High |
| | Payment received? | 7 | Open | Normal |
| | Received from client? | 6 | Closed | Normal |
| | T-filed | 0 | Closed | Normal |

## Notes

## Actions Types and Topics Worksheets

After reviewing your Organizations workflow and comparing to the Actions defaulting in Nexsure, create a list of Actions by using the worksheets provided in this section. After compiling the list it will be easy to quickly enter them in Nexsure following the instructions in this chapter.

**New Action Type Screen**

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**Note:** The Type icon also determines how the action interacts with Microsoft Outlook. Assigning a type to an appointment or phone call icon will synchronize the action with your Outlook Calendar. Assigning any other icon to the type will synchronize the action with the Outlook Task pad.

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**Icon Choices:**

Phone

Information

Calendar

General

Questionmark

Description

View

Feedback

Open Folder

Closed Folder

**Worksheet for Action Types**

| Type | Icon | Status | Description |
|---|---|---|---|
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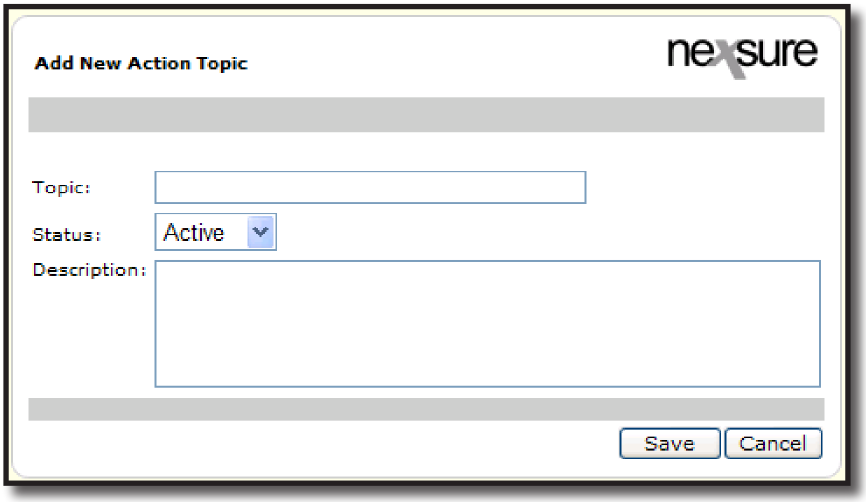
### New Action Topic Screen




### Worksheet for Action Topics

| Topic | Status | Description |
|---|---|---|
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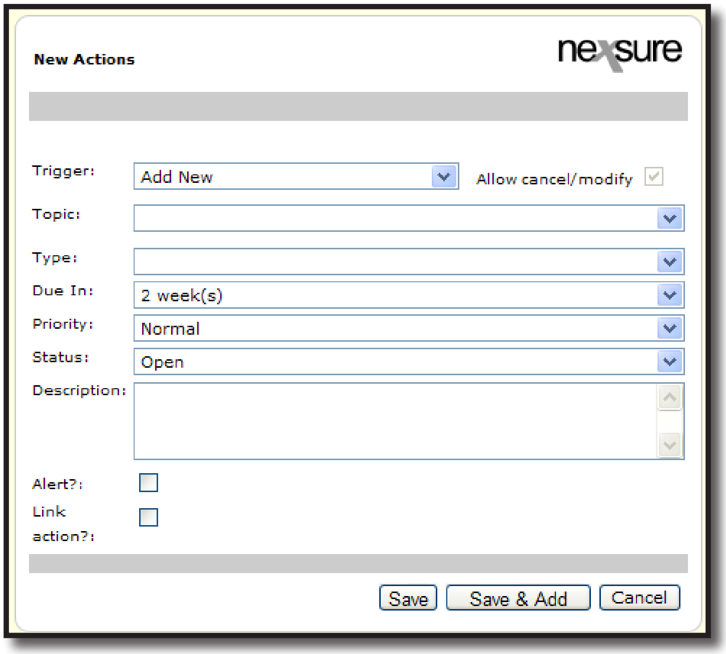
### New Actions Screen




### Worksheet for Action Topic/Type Associations

| Topic | Type | Due In | Open / Closed | Alert Message | Linked Action | Default Memo |
|---|---|---|---|---|---|---|
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## Notes