Chapter 10

Auto ID Cards

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✖ Adding Auto ID Cards

✖ Updating the Auto ID Card

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Adding Auto ID Cards

Auto ID cards can be created and issued for each vehicle listed on an application. The generic ACORD 50 will generate unless a state specific Auto ID form exists for the vehicle. A fleet card can be generated for a commercial auto policy as well as a blank Auto ID FORM to allow an auto ID card to be created for a vehicle not currently listed on the policy.

HOW to Add Auto ID Cards

■ Locate the appropriate client through **SEARCH** and click the **SERVICING** link on the **Client** menu.

■ Click the **Verification** option.

■ All in force auto policies are displayed. Select the auto policy to create the auto ID card for and click the **[Next]** link.

■ The **verification policy master** tab will be displayed with all vehicles on the application.

■ Nexsure generates the **Verification Number** displayed in the header.

■ The **Policy Number** and issuing **Carrier Name** along with the policy's term and **Coverage Effective Date** is displayed in the header.

■   The **Reference** field is blank and can be used for internal notes for the master verification, it will not be displayed on the auto ID card.

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

■   Each vehicle will have its own **Details** icon. Proceed to **HOW to Update an Auto ID Card** section in this document to make changes to the Auto ID form for a vehicle.

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

■   The **Year**, **Make**, **Model** and **VIN** number of each vehicle is displayed.

■   The standard ACORD 50 will be displayed in the **Form** drop-down box, unless a state specific form exists. There are four areas in Nexsure that the Auto ID form is determined which are listed below:

❑   The default State for each vehicle ID card should be the garaging address State listed on the application (If any).

❑   If no garaging address exists, the default State will be the license/registration State of the vehicle (If any).

❑   If no garaging address or license State exists, the default State will be the applicants address State listed on the form.

❑   If none of the above exist, the default State will be the State the actual coverage form is from (ACORD 90CA = CA, etc).

❑   The application State of the ACORD form. Until the ID card is issued, select any available

state.

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

- If the **form** in the drop-down box is incorrect, select the correct form from the drop-down box.

- The **Insured** name drop-down box defaults to the Primary Named Insured, but the drop-down box will include all Named Insured's from the client's **named insured** tab and all drivers listed on the policy.

- If the **Insured** name for a vehicle is incorrect, select the correct name from the drop-down box.

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

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

- The **Print** link is only active when the Auto ID card is issued.

- The **Remove** icon will allow the selected auto ID card to be deleted.

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

HOW to Add a New Vehicle or a Fleet Auto ID Card

A fleet auto ID card can be created for a commercial policy or an auto ID card can be created for a vehicle not currently listed on the policy:

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

- The **Vehicle Information** pop-up window appears along with a new auto verification line item highlighted in yellow behind it.

■ If a **fleet card** is needed:

❑ Click the **Fleet** option.

❑ Click the **Select** button to have the generic fleet information generate into the new auto verification line item.

❑ Click the **Manual Entry** option to manually enter the fleet information in the new auto verification line item.

❑ Click the **Cancel** button to abort the addition.

■ If an **auto ID card** needs to be added for a vehicle not currently listed on the policy.

❑ Click the vehicle option that may be similar to the vehicle being added.Clicking the **Select** button will prefill that existing vehicles information into the new auto verification line item.

❑ Click the **Manual Entry** option to enter the new vehicle information in the new auto verification line item.

❑ Click the **Cancel** button to abort the addition.

■ If the **Select** button was chosen in either of the above situations, the information will prefill to the new auto verification line item. Edit the prefilled information if necessary.

■ If the **Manual Entry** button was selected in either of the above situations, complete the new auto verification line item.

■ If the new auto verification line item was entered in error, clicking the [**Cancel Add New**] link to

the right of the verification summary view will remove the new line item.

- The **Active** check box will be selected. Removing the check from the Active check box will not allow an ID card to be issued and removes that vehicle from the **verification** tab **vehicles** summary view

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

Note: The auto ID card must be issued before the card may be printed. Once the card is issued, it cannot be removed or edited.

- The **Print** link will not become active until the auto ID card is issued.

- The **Remove** icon will allow the selected auto ID card to be deleted. If the **Remove** icon is not available and the auto ID card should be deleted, see the Nexsure point person within the agency for assistance.

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

- After saving, the **[Add New]** link to the right of the verification summary view will become active again so that other auto ID cards can be created if necessary.

HOW to Understand the Verification Tab Summary View

All auto ID cards created for the client will be displayed on the **verifications** tab in a summary view. The Current View drop-down box, displayed in the upper left corner of the screen, will determine what is displayed in the **verifications** tab summary view. The summary view will give you pertinent information regarding auto ID cards that have been created for the client.

- Locate the appropriate client through **SEARCH** and click the **POLICIES** link on the **Client** menu.

- Click the **verifications** tab, all unissued and/or issued auto ID cards that fall within the search filter criteria are displayed. If an auto ID card is not displayed, click the **[Show]** filter located in the upper right corner of the screen, change the search criteria, and click the **Search** button to initiate a new search.

    - Clicking the filters **[Show]** link displays the search criteria defaults set by Nexsure or specified by the user. The search results are based on the defaults setup in this filter. The defaults can be changed on an individual basis, or the filter can be saved according to the Users specifications by entering the search criteria and clicking the **Save Filter Settings** check box.
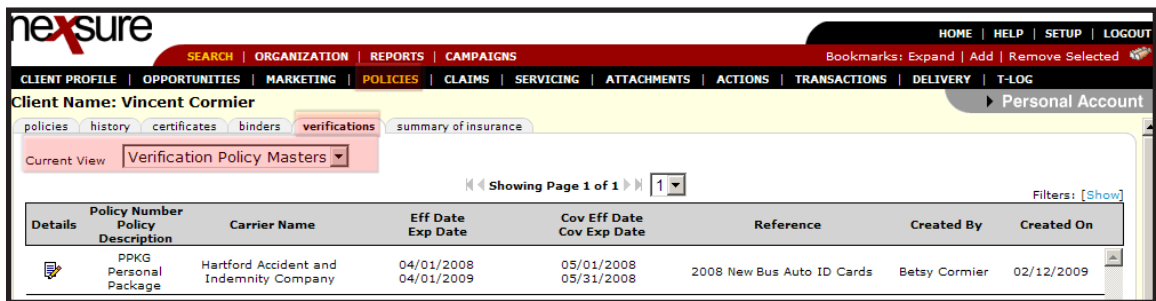
WHAT is Displayed when Current View = Verification Policy Masters

All master verification records added through Servicing will display when selecting **Verification Policy Masters** from the Current View drop-down box.

- Select **Verification Policy Master** from the Current View drop-down box, all master verification records that fall within the search filter criteria, display.

- Clicking the **Details** icon of a **master verification record** displays the master verification header along will all auto ID cards added.

- The **Policy Number**, **Policy Description** and **Issuing Carrier** name along with the policy's **term** and **coverage dates** are displayed.

- If a **Reference** was entered for the master verification record in the header it will be displayed in the summary view. References are optional and can be used to note new business verifications, new vehicle additions, etc., they are not displayed on the auto ID card.

  Note: The reference field is used for internal notes for your records. This field does not flow to the auto ID card.

- The **created by** displays the name of the user who created the master verification record and the date of **creation**.


WHAT is Displayed when Current View = Vehicles

All vehicles that an auto ID card has been created for display when selecting **Vehicles** from the current view drop-down box.

- Select **Vehicles** in the Current View drop-down box.

- All vehicle auto ID cards which fall within the search filter criteria will be displayed. The default view is all Active vehicles for both Issued and un-Issued auto ID cards.
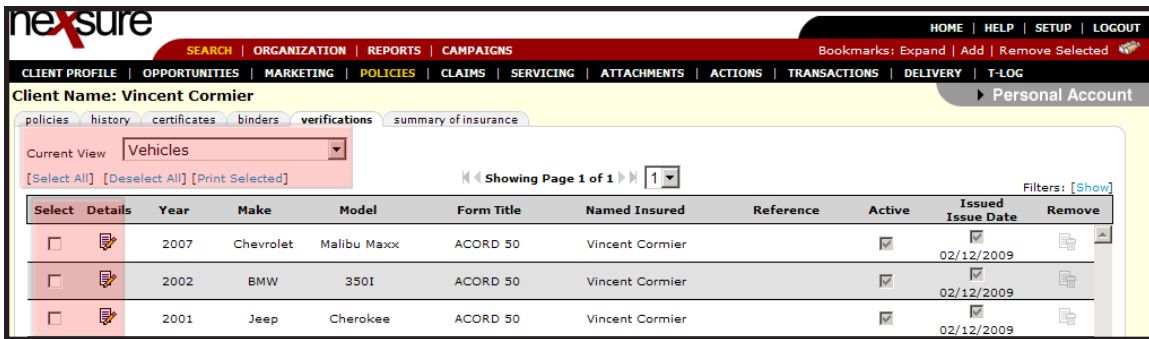
- The **Select** check box, used for printing, will not become active until an auto ID card is issued.

- Clicking the **Details** icon of an issued **auto ID card** will display a dark teal verification header and opens the auto ID form under the header for viewing. The form will be locked down and not available for editing.
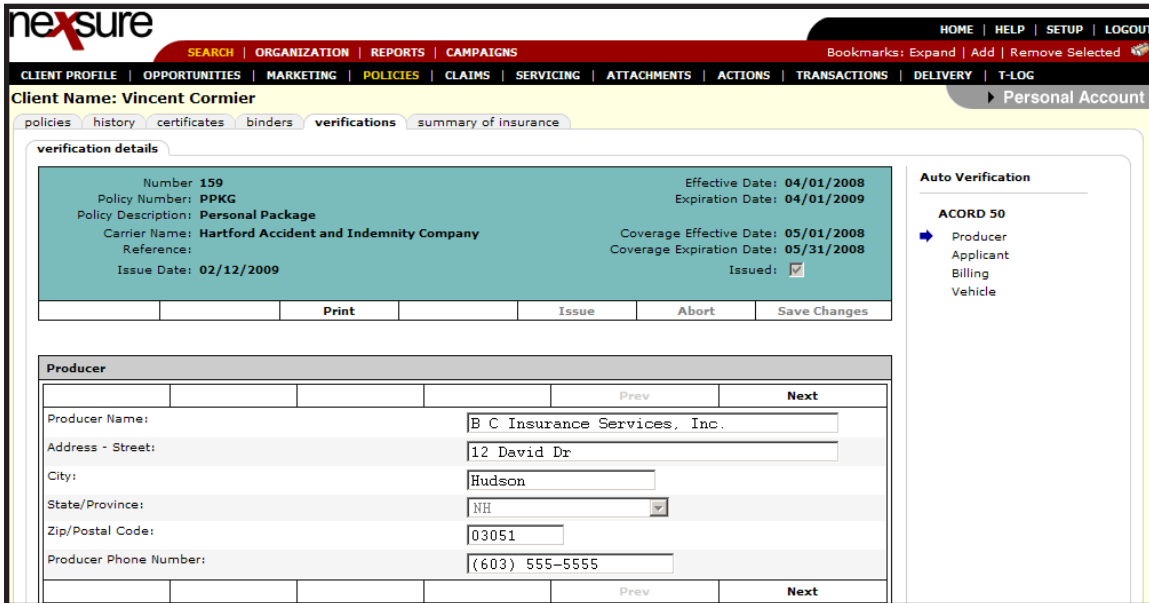
Note: An issued auto ID card cannot be removed.

Notes

Updating the Auto ID card

The information contained in unissued auto ID form can be changed for each vehicle if needed. Auto ID cards can be accessed individually or through the Master Verification.

HOW to Update an Auto ID card

- Locate the appropriate client through **SEARCH** and click the **POLICIES** link on the **Client** menu.

- Click the **verifications** tab, all unissued and issued auto ID cards that fall within the search filter criteria will be displayed.

An auto ID card can be accessed in one of two ways:

- If the Current View in the drop-down box displays **Vehicles,** click the **Details** [icon] icon of the unissued vehicle to be edited.

    - A light teal color verification header and the open auto ID form under the header is available for editing.

- If the Current View in the drop-down box displays **Verification Policy Master**, click the **Details** [icon] icon of the Master Verification record.

    - All vehicles listed on the Master Verification display.

    - Click the **Details** [icon] icon of the unissued vehicle to be edited.

    - A light teal color verification header and the open Auto ID form under the header is available for editing.

- The **Reference** field in the header pertains to the vehicle being accessed. The **Reference** field can be used for internal notes on the vehicle, it will not display on the auto ID card.

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

- Once all changes are made and saved, click the word **Auto Verification** at the top of the navigation tree to close the form.

### HOW to Issue Auto ID Cards

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

- Locate the appropriate client through **SEARCH** and click the **POLICIES** link on the **Client** menu.

- Click the **verifications** tab, all unissued and issued auto ID cards that fall within the search filter criteria will be displayed.

- To issue an auto ID card for a single vehicle:

    - The Current View in the drop-down box should display **Vehicles.**

❑ Click the **Details** ✐ icon of the vehicle the auto ID card is to be issued for.

❑ A light teal color verification header and the open auto ID form under the header is available for editing.

❑ See **HOW to update an auto ID card** in this chapter to edit the ACORD form of the selected vehicle.

❑ Once all changes are made and saved, click the **Issue** link in the navigation toolbar under the header.

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

❑ Click the **verifications** tab to exit the auto ID card.

❑ Proceed to **HOW to print auto ID cards**.

■ To issue auto ID cards for all vehicles:

❑ The Current View in the drop-down box in the **verifications** tab should display **Verification Policy master.**

❑ Click the **Details** ✐ icon of the Master Verification.

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

❑ See **HOW to update an auto ID card** in this chapter to edit the ACORD form of the selected vehicle.

❑ Clicking the **Delete All** link in the navigation toolbar under the master verification header will delete all unissued auto ID cards. A confirmation pop-up window appears, click **OK** to delete all unissued auto ID cards. Click **Cancel** to abort.
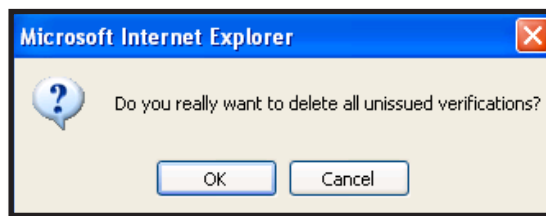
❑ Clicking the **Abort** link in the navigation toolbar under the master verification header will delete the Master Verification record. A confirmation pop-up window appears, click **OK** to delete the Master Verification record. Click **Cancel** to abort.

❑ Once all changes are made and saved, click the **Issue All** link in the navigation toolbar under the master verification header. A confirmation pop-up window appears, click **OK** to issue all verification records. Click **Cancel** to abort.
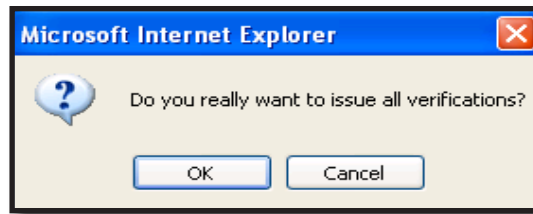
- ■ The **Issued** check box will be checked and the **Issue Date** displays along with a **Printer** ⬛ icon. The **Print** link under the master verification header will also now be active.


HOW to Print Auto ID Cards

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

HOW to Print from the Master Verification

- ■ Locate the appropriate client through **SEARCH** and click the **POLICIES** link on the **Client** menu. Click the **verifications** tab.

- ■ Select **Verification Policy Master** from the current view drop-down box, master verification records that fall within the search filter criteria are displayed.

- ■ Clicking the **Details** 📝 icon of the **master verification record** displays the master verification header along will all auto ID cards added to that master policy verification record.

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

- ■ Click the **Select** check box to the left of the auto ID card you wish to print, or click the **[Select All]** link to select all auto ID cards to print.

■ Click the **[De-select all]** to remove all selected auto ID cards.

■ Select the **Printer** and the **Number of Copies** needed from the drop-down boxes and click the **Print** link. The auto ID card will be sent to the printer selected. Click **Cancel** to abort.
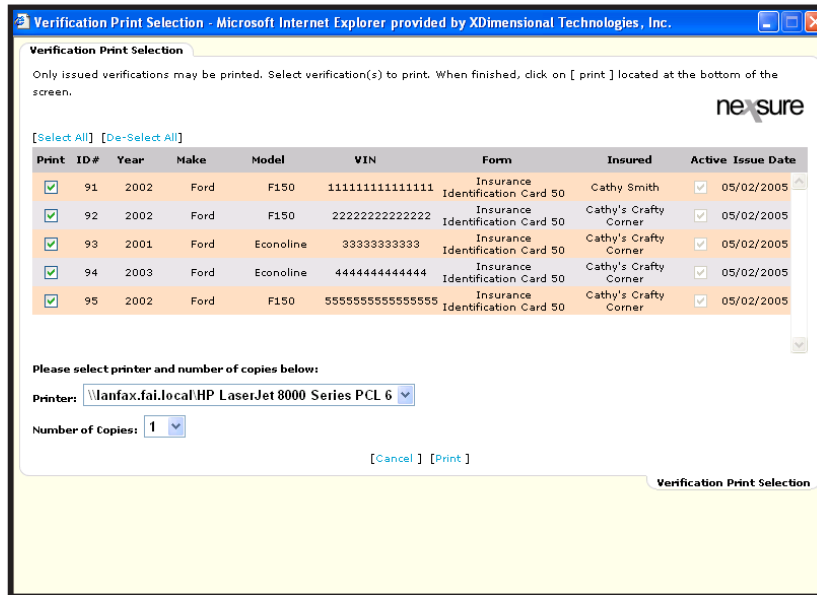

## HOW to Batch Print from the Verification Summary View

■ Locate the appropriate client through **SEARCH** and click the **POLICIES** link on the **Client** menu. Click the **verifications** tab.

■ Select **Vehicle** from the current view drop-down box, all unissued and issued auto ID cards that fall within the search filter criteria, display.

■ Click the **Select** check box to the left of each issued auto ID card you wish to print, or click the **[Select All]** link to select all issued auto ID card to print.

■ Clicking the **[Deselect All]** will remove the check from all selected auto ID card.

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

■ Select the **Printer** and the **Number of Copies** needed from the drop-down boxes and click the **Print** link, the auto ID cards will be sent to the printer selected. Click **Cancel** to abort.

Notes

Delivering the Auto ID Card

■   Locate the appropriate client through **SEARCH** and click the **DELIVERY** link on the **Client** menu.

❑   Defaults configured in the **[Show]** filters option will determine what is displayed in the summary view when clicking the **DELIVERY** link.

■   Click the **[Add New]** link.

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

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

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

■   The **Add Delivery Attachment** pop-up window and **verification** tab will display.

■   All **master verification records** are displayed with the Policy Number, Carrier, Policy Term, Coverage Term, Reference, Created By and Creation Date.
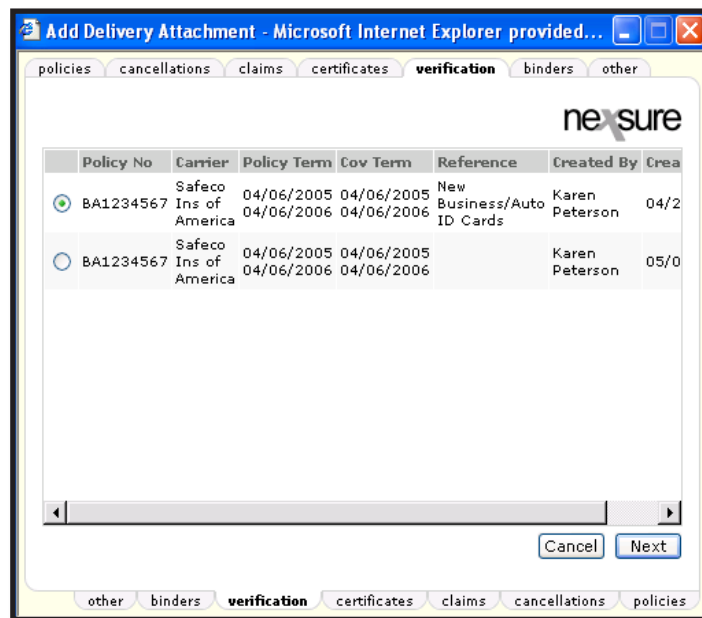
■   Click the appropriate **master verification record** option to deliver.

■   Click the **Next** button. All issued auto ID cards contained in the master verification record display.

■   To e-mail all the auto ID cards click the **check box** in the gray title bar. This will place a check mark in the box for all vehicles, or manually click in the check boxes of the auto ID cards to deliver.
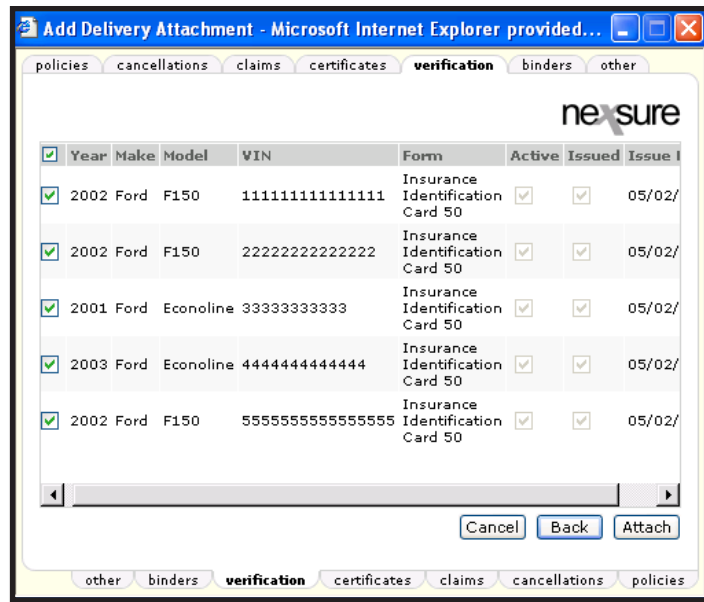
- Click the **Attach** button. Click **Close** to abort.

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

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

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

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

- Each delivery will have its own **Details** ✎ icon. To view the details, perform the following steps:

  - Click the **Details** ✎ icon to display the e-mail or fax information, the forms included, and the total number of attachments.

  - Click the **viewer** tab and each form included in the e-mail or fax is displayed with a **Magnifying Glass** 🔍 icon.

  - Click the **Magnifying Glass** 🔍 icon to view the information contained in the form that was sent.

- The Delivery Summary View screen can be accessed from the **Home** menu, or the **Client** menu. The **Home** menu will display a summary of all deliveries sent by the user. The **client** level will only display deliveries for the specified client.

Notes