## Chapter 10

# **Auto ID Cards**

-----

#### IN THIS CHAPTER

- Adding Auto ID Cards
- \* Updating the Auto ID Card
- Delivering the Auto ID Card

### 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.

CLIENT PROFILE   OPPORTUNITIE	S   MARKETING	POLICIES   CLAIMS   SERVICING	ATTACHMENTS   ACT	ONS   TRANSACTIONS   D	ELIVERY   T-LOG	Commercial Account
servicing	· · · · · · ,					
Services			11 - I	Showing Page 1 of 1	~	
Marketing	Select policy to p	reate verification from:				
Market Analysis	Select policy to c					[Next]
Binders	Salact	Line of Business Rolicy Number	Stage	Policy Term	Coverage Term	Billing Carrier
Edit	Denect	Policy Description	Status	Policy Term	coverage term	Issuing Carrier
Endorsement	۲	Auto - Commercial	Policy	05/01/2009	05/01/2009	AIG National Insu AIG National Insu
Renewal		(CAUTO) Truckers (TRUCK)	Delicy			AIG National Josu
Cancellation	0	TR-987987987 Truckers	In Force	08/12/2009 08/12/2010	08/12/2009 08/12/2010	AIG National Insu
Claim						
Audit						
New Certificate(s)						
Renewal Certificate(s)						
Verification(s)						

- 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.

2	sur	е										Home   He	LP	SETUP   LO
			SEARCH	ORGANIZATION   R	EPORTS					Во	okmark	s: Expand   )	Add	Remove Sel
NT PRO	FILE	OPPO	DRTUNITIES	MARKETING   PO	LICIES   CLAIMS	SERVICING   AT	TACHN	IENTS   AC	TIONS   TRANS	ACTIONS	DELI	IVERY   T-LO	JG	
pect M	Name	: Cat	hy's Cra	fty Corner									comm	ercial Acco
cies Y	history	i ce	rtificates	binders verificatio	<b>ns</b> `` summary of ins	urance								
arificat	tion po	icy ma	aster											
	_	Nu	mber: 29							Ef	fective (	Date: 04/06	/2005	
	Po	licy Nu arrier I	mber: BA: Name: Safi	1234567 eco Ins of America					Cou	Exp erage Ef	iration ( fective (	Date: 04/06. Date: 04/06	/2006 /2005	
	Ŭ	Refe	rence:	and the of America					Cove	rage Exp	iration [	Date: 04/06	/2006	
				Print	Delete All	Issu	ue All		Abo	rt		Save (	hang	es
erificati	ion Sur	nmary											1	Add New]
Details	Year	Make	Model	VIN	Fo	m		In	isured	Active	Issued	Issue Date	Print	Remove
<b>&gt;</b>	2002	Ford	F150	1111111111111111	Insurance Identifica	ition Card 50	~	Cathy Sm	ith 💌				6	R.
							_							
₽	2002	Ford	F150	2222222222222222	Insurance Identifica	ition Card 50	~	Cathy's Cr	afty Corner 🔽	<b>~</b>			6	
	2002 2001	Ford Ford	F150 Econoline	333333333333	Insurance Identifica	ition Card 50 ition Card 50	*	Cathy's Cr Cathy's Cr	afty Corner 💌 afty Corner 💌	<ul> <li>✓</li> </ul>			8 8	
₽	2002 2001 2003	Ford Ford Ford	F150 Econoline Econoline	222222222222222 333333333333 4444444444	Insurance Identifica Insurance Identifica Insurance Identifica	ition Card 50 ition Card 50 ition Card 50	*	Cathy's Cr Cathy's Cr Cathy's Cr	rafty Corner 👻 rafty Corner 👻 rafty Corner 👻	<ul> <li></li> <li><td></td><td></td><td>8 8</td><td></td></li></ul>			8 8	
• • • • •	2002 2001 2003 2002	Ford Ford Ford Ford	F150 Econoline Econoline F150	222222222222222 33333333333 44444444444	Insurance Identifica Insurance Identifica Insurance Identifica Insurance Identifica	ition Card 50 ition Card 50 ition Card 50 ition Card 50	* * *	Cathy's Ci Cathy's Ci Cathy's Ci Cathy's Ci	rafty Corner 👻 rafty Corner 👻 rafty Corner 👻 rafty Corner 👻	<ul> <li></li> &lt;</ul>			8 8 8	
• • • •	2002 2001 2003 2002	Ford Ford Ford Ford	F150 Econoline Econoline F150	22222222222222 3333333333 4444444444444	Insurance Identifica Insurance Identifica Insurance Identifica Insurance Identifica	ition Card 50 ition Card 50 ition Card 50 ition Card 50	* * *	Cathy's Ci Cathy's Ci Cathy's Ci Cathy's Ci	rafty Corner 👻 rafty Corner 💙 rafty Corner 💙 rafty Corner 💙	<ul><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li></ul>		verificatio	a a a a n poli	E E E E

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).
  - **D** 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.

ent Na	me: Ca		NITTES   M	ARKETING   POLICIE	5   CLAIMS   <mark>SERVICING</mark>   ATTACHMENTS	5   AC	TIONS   TRANSACT	IONS	DELIVE	RT   I-LUG		
lisian		thy's C	rafty Cor	ner						► Co	mmer	cial Acco
verificat	history ion polic	certifica y master	ites bind	Vehicle Infor	nation Ne SU	re						
	Polic Car	Numbe y Numbe rier Name Reference	r: 36 r: BA1234 e: Safeco I e:		FLEET     2002 Ford F150     2002 Ford F150     2002 Ford F150     2001 Ford Econoline		Cove Covera	Eff E×pi rage Eff ige E×pi	ective D ration D ective D ration D	ate: 04/06/ ate: 04/06/ ate: 04/06/ ate: 04/06/	2005 2006 2005 2006	
			P		2003 Ford Econoline		Abort			Save C	hange	5
Verificat Details	ion Sumr Year	nary: Make	Model	Cance	<ul> <li>2002 Ford F150</li> <li>Manual Entry Select</li> </ul>		Insured	Active	Issued	[ ( Issue Date	Cancel Print	Add New] Remove
0					Insurance Identification Card 50 NV 💌	Cathy	's Crafty Corner 😽					
			54.50	11111111111111111	Insurance Identification Card 50 🛛 👻	Cathy	Smith 🔽				6	E.
 ₽	2002	Ford	F150									
 ₽ ₽	2002 2002	Ford Ford	F150	22222222222222222	Insurance Identification Card 50 🛛 👻	Cathy	's Crafty Corner 🔽	Image: A start of the start				
	2002 2002 2001	Ford Ford Ford	F150 F150 Econoline	2222222222222222 333333333333	Insurance Identification Card 50 v Insurance Identification Card 50 v	Cathy Cathy	's Crafty Corner 🛩 's Crafty Corner 🛩	<ul> <li>✓</li> </ul>			6 6	
••••••••••••••••••••••••••••••••••••••	2002 2002 2001 2003	Ford Ford Ford Ford	F150 F150 Econoline Econoline	2222222222222222 333333333333 4444444444	Insurance Identification Card 50 Insurance Identification Card 50 Insurance Identification Card 50	Cathy Cathy Cathy	's Crafty Corner 👻 's Crafty Corner 👻 's Crafty Corner 👻	<ul> <li></li> <li><td></td><td></td><td>8 8 8</td><td></td></li></ul>			8 8 8	

- 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**.

nex	sure					HOME	HELP   SETUP   LOGOUT
CLIENT PR		TUNITIES   MARKETING	POLICIES   CLAIMS	NS SERVICING   ATTACHMEN	TS   ACTIONS   TRANSACTIONS	DELIVERY	T-LOG
Client Na policies	history certific	Cormier	ons summary of insura	nce		-	Personal Account
Current	View Verificat	tion Policy Masters 💌			-		
			l I Sh	owing Page 1 of 1 🕅 1	•		Filters: [Show]
Details	Policy Number Policy Description	Carrier Name	Eff Date Exp Date	Cov Eff Date Cov Exp Date	Reference	Created By	Created On
	PPKG Personal Package	Hartford Accident and Indemnity Company	04/01/2008 04/01/2009	05/01/2008 05/31/2008	2008 New Bus Auto ID Cards	Betsy Cormier	02/12/2009

### 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.

r	<b>IEX</b>	sur	е							HOME   HELP	SETUP   LOG	оυт
			SEAF	CH   ORGANIZ	ATION   REPORTS	CAMPAIGNS		Book	marks: Exp	and   Add   Remo	ove Selected	1
(	LIENT P	ROFILE	OPPORTUNI	TIES   MARKE	TING   POLICIES	CLAIMS   SERVI	CING   ATTACHMENTS	ACTIONS   TRANSACT	IONS   DEL	IVERY   T-LOG		
C	ient N	ame: V	/incent Cor	mier						Perso	onal Accou	int
6	policies	history	certificates	binders v	erifications summ	nary of insurance						
	Current	View	Vehicles		•							
	[Select )	All] [Des	select All] [Pri	nt Selected]		Showing F	Page 1 of 1 ▶ 🕅 📘 💌			Fi	Iters: [Show]	
	Select	Details	s Year	Make	Model	Form Title	Named Insured	Reference	Active	Issued Issue Date	Remove	
		<b>*</b>	2007	Chevrolet	Malibu Maxx	ACORD 50	Vincent Cormier		V	₩ 02/12/2009		
		<b>*</b>	2002	BMW	3501	ACORD 50	Vincent Cormier		V	₩ 02/12/2009	E.	
		<b>*</b>	2001	Jeep	Cherokee	ACORD 50	Vincent Cormier		V	₩ 02/12/2009	E:	

- 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.

							Home   Help   Setup   Lo
	SEARCH   ORGA	NIZATION   REPOR	RTS   CAMPAIGNS	;		Bookmarl	cs: Expand   Add   Remove Selected
IENT PROFILE   OPI	PORTUNITIES   MAI	RKETING   POLICI	ES   CLAIMS	SERVICING   ATTA	HMENTS   ACT	IONS   TRANSACTIONS	DELIVERY   T-LOG
nt Name: Vince	ent Cormier	s verifications	summary of ins	surance			Personal Accord
verification details							
Nur	mber <b>159</b>				Effective	Date: 04/01/2008	Auto Verification
Policy Num Policy Descrip	iber: PPKG ition: Personal Pac	kage			Expiration	Date: 04/01/2009	ACORD 50
Carrier Na Refere Issue D	ame: Hartford Accie ance: Date: 02/12/2009	dent and Indemnit	y Company	Cove	erage Effective age Expiration Is	Date: 05/01/2008 Date: 05/31/2008 isued: 🔽	<ul> <li>Producer</li> <li>Applicant</li> <li>Billing</li> <li>Vehicle</li> </ul>
		Print		Issue	Abort	Save Changes	
Producer			1	1			
				Pre	V	Next	
Producer Name:			BCI	nsurance Servi	ces, Inc.		
Producer Name: Address - Street:			ВСІ 12 Da	nsurance Servi wid Dr	ces, Inc.		
Producer Name: Address - Street: City:			B C I 12 Da Hudso	nsurance Servi wid Dr m	ces, Inc.		
Producer Name: Address - Street: City: State/Province:			B C I 12 Da Hudso NH	nsurance Servi wid Dr m	ces, Inc.		
Producer Name: Address - Street: City: State/Province: Zip/Postal Code:			B C I 12 Da Hudso NH 03051	insurance Servi wid Dr m	ces, Inc.		
Producer Name: Address - Street: City: State/Province: Zip/Postal Code: Producer Phone No	umber:		B C I 12 Da Hudso NH 03051 (603)	insurance Servi wid Dr m 	ces, Inc.		

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 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 of the Master Verification record.
  - □ All vehicles listed on the Master Verification display.
  - □ Click the **Details** 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:
  - **D** 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.

IT PROF	ILE	OPPOR	TUNITIES	MARKETING   PC	DLICIES   CLAIMS   :	SERVICING   ATTACK	HMENTS   ACT	IONS   TR	ANSACTI	IONS   D	ELIVERY   T-	LOG	Kelliove se
it Nan	ne: Ca	athy'≤	s Crafty C	orner							-	Comn	nercial Acc
ies h	nistory	Y certi	ficates Y bii	nders verificatio	ons summary of ins	urance							
	Poli Ca	Num cy Num rrier Na Refere	ber: 40 ber: BA123 me: Safeco nce:	4567 Ins of America				(	Coveraç Coverage	Effectiv Expiratio ge Effectiv Expiratio	ve Date: 04/0 on Date: 04/0 ve Date: 04/0 on Date: 04/0	6/200 6/200 6/200 6/200	5 6 5 6
				Print	Delete All	Issue A	1		Abort		Save	e Chang	185
rificatio	n Sum	mary:	1	I									[ Add New]
rificatio etails	n Sum Year	mary: Make	Model	VIN		-	Insur	ed	Active	Issued	Issue Date	Print	[ Add New] Remove
rificatio etails	n Sum Year 2002	mary: Make Ford	Model F150	¥IN	555 Insurance Ide	<b>form</b> ntification Card 50	<b>Insur</b> Cathy's Craf	<b>ed</b> ty Corner	Active	Issued	Issue Date 05/02/2005	Print	[ Add New] Remove
rificatio etails	n Sum Year 2002 2003	Make Ford Ford	Model F150 Econoline	VIN 555555555555555 444444444444	555 Insurance Ide	form ntification Card 50 ntification Card 50	Insur Cathy's Craf Cathy's Craf	<b>ed</b> ty Corner ty Corner	Active	Issued V	Issue Date 05/02/2005 05/02/2005	Print	[ Add New] Remove
rificatio etails P	on Sum Year 2002 2003 2001	Make Ford Ford Ford	Model F150 Econoline Econoline	¥IN 5555555555555 444444444444 33333333333	555 Insurance Ide 44 Insurance Ide 3 Insurance Ide	orm ntification Card 50 ntification Card 50 ntification Card 50	Insur Cathy's Craf Cathy's Craf Cathy's Craf	<b>ed</b> ty Corner ty Corner ty Corner	Active	Issued ✓ ✓	Issue Date 05/02/2005 05/02/2005 05/02/2005	Print	[ Add New] Remove
etails	n Sum Year 2002 2003 2001 2002	Make Ford Ford Ford Ford	Model F150 Econoline Econoline F150	VIN 5555555555555 444444444444 33333333333	555 Insurance Ide 44 Insurance Ide 3 Insurance Ide 22 Insurance Ide	orm ntification Card 50 ntification Card 50 ntification Card 50 ntification Card 50	Insur Cathy's Craf Cathy's Craf Cathy's Craf Cathy's Craf	<b>ed</b> ty Corner ty Corner ty Corner ty Corner	Active	Issued ✓ ✓ ✓ ✓	Issue Date 05/02/2005 05/02/2005 05/02/2005 05/02/2005	Print	[ Add New] Remove
rificatio etails	<b>Year</b> 2002 2003 2001 2002 2002	Make Ford Ford Ford Ford Ford	Model F150 Econoline Econoline F150 F150	VIN 55555555555555 444444444444 3333333333	555 Insurance Ide 144 Insurance Ide 38 Insurance Ide 22 Insurance Ide 111 Insurance Ide	orm ntification Card 50 ntification Card 50 ntification Card 50 ntification Card 50 ntification Card 50	Insur Cathy's Craf Cathy's Craf Cathy's Craf Cathy's Craf Cathy S	ed ty Corner ty Corner ty Corner ty Corner mith	Active	Issued V V V V V	Issue Date 05/02/2005 05/02/2005 05/02/2005 05/02/2005	Print	[ Add New] Remove

### 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.

🕙 Verificati	ion Print	Selection - I	Microsoft Intern	et Explorer provide	d by XDimensional Te	chnologies, Inc.	
Verificatio	n Print Se	election					
Only issue screen,	d verifica	tions may be	printed. Select ve	rification(s) to print.	When finished, dick on	[ print ] located at	the bottom of the
							ne sure
[Select All]	] [De-Se	lect All]					
Print ID	# Yea	• Make	Model	VIN	Form	Insured	Active Issue Date
9	1 20	D2 Ford	F150	11111111111111111	Insurance Identification Card 50	Cathy Smith	05/02/2005
9	2 20	D2 Ford	F150	2222222222222222	Insurance Identification Card 50	Cathy's Crafty Corner	05/02/2005
9	3 20	D1 Ford	Econoline	33333333333	Insurance Identification Card 50	Cathy's Crafty Corner	✓ 05/02/2005
9	4 20	D3 Ford	Econoline	444444444444	Insurance Identification Card 50	Cathy's Crafty Corner	05/02/2005
9	5 20	D2 Ford	F150	555555555555555555555555555555555555555	Insurance Identification Card 50	Cathy's Crafty Corner	✓ 05/02/2005
Please sel	ect print	er and numbe	r of copies below:				
Printer:	lanfax.	fai.local\HP	LaserJet 8000 S	ieries PCL 6 🔽			
Number of	f Conies:	1 🗸					
	copiesi			[Capcel ] []	Print 1		
				Eoguer 1 F		Ver	ification Print Selection

#### 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.

1	Ad	d Deli	ivery /	Attachme	nt - Microsoft Inter	net Explorer	provid	ed	
F	oolic	ies 丫	cance	llations	claims certificates	verification	binder	's oth	er
								nes	sure
	2	Year	Make	Model	VIN	Form	Active	Issued	Issue I
	~	2002	Ford	F150	1111111111111111	Insurance Identification Card 50	¥	<b>V</b>	05/02/
	✓	2002	Ford	F150	222222222222222	Insurance Identification Card 50			05/02/
	<b>~</b>	2001	Ford	Econoline	3333333333	Insurance Identification Card 50	¥	<b>V</b>	05/02/
	<b>~</b>	2003	Ford	Econoline	44444444444	Insurance Identification Card 50	<b>V</b>		05/02/
	<b>~</b>	2002	Ford	F150	555555555555555555555555555555555555555	Insurance Identification Card 50	¥	<b>V</b>	05/02/
	•								►
						Canc	el B	ack 🛛	Attach
		othe	er / bi	nders <b>v</b> e	erification certificat	es / claims /	cancell	ations 人	policies

- 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 (1) icon.
  - Click the Magnifying Glass (a) 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
