Chapter 16

Actions

IN THIS CHAPTER

- Adding Actions
- Action Plans
- Action Triggers
- Editing Actions
- Closing and Reopening Actions
- Tracking Actions

Adding Actions

Actions are used to document and are also used as follow up reminders. By default, Nexsure opens to the **HOME > ACTIONS** screen after logging in. This is to give you a daily list of actions, or tasks, which may need to be followed up on or completed for that day. Actions can be used for business or personal reminders.

> **Note:** Actions created in Nexsure CANNOT be deleted. Actions should be used to document important client and/or carrier conversations and used to enter information pertinent to clients and/or policies.

There are three levels of actions that can be created.

- **Personal Actions**: This action is created from the **HOME > ACTIONS** screen. An action created here would be a personal action or reminder to follow up on a potential client that has no card file created yet or a personal appointment that needs to be kept. Any actions created as Personal Actions remain personal and may not be associated to a client or policy.
- **Client Actions**: This action is created from the **ACTIONS** link on the **Client** menu. An action created here would contain general information pertaining to a client.
- **Policy Actions**: This action is created from the **actions** tab at the policy level. An action created here would pertain to a client's policy. Policy level actions include actions added from a client's **opportunities** or **marketing** records.

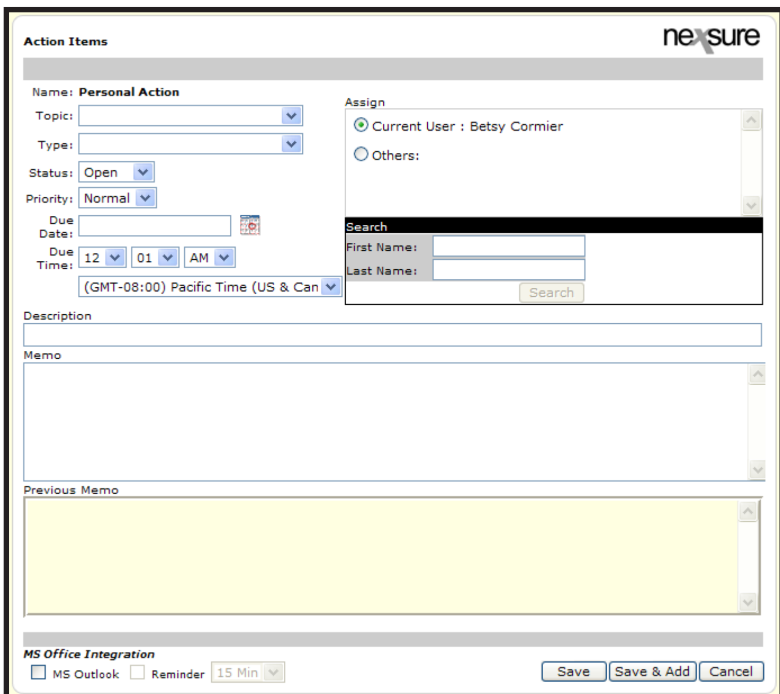
> **Note:** Nexsure automatically creates actions when policies are serviced as well. Each servicing topic identifies if an action is automatically created. Each organization controls the default status of these actions.

HOW to Add a Personal Action

- The **HOME > ACTIONS** screen is the first screen displayed when logging into Nexsure. Actions due today or in the past that have not been completed are displayed in a summary view. An action created here is a personal action or reminder to follow up on a potential client or a reminder of an appointment that needs to be kept.

Note: When creating a personal action keep in mind that personal actions may be viewed by anyone in the agency.

- Move the pointer over the **[Add New]** link to display the actions menu. Select **Action** to add a single action. Click **Plan** to choose a plan and add a defined series of actions. See "HOW to Add a New Action Plan" later in this chapter. Select **Action** to display the **Action Items** pop-up window.



Note: An action created from **HOME** > **ACTIONS** cannot be associated to a client or policy.

- The **Name** field at the top of the action identifies the action as a **Personal Action**. Actions created from the **HOME** > **ACTIONS** screen cannot be associated to a client.

- Select a **Topic** for the action from the drop-down box. Topics are unique and allow grouping of like items together.
- Select a **Type** of action from the drop-down box. Types are not unique and may be used again for any topic.
- The **Status** of the action will default to either **Open** or **Closed** depending on how the status was associated to the topic in **SETUP > Actions** by the agency administrator. Select the appropriate **Status** from the drop-down box.
  - An **Open** status is used to create a future follow up for an action. When the action has been completed the status is changed to closed. A **Closed** status action will not appear on the **HOME > ACTIONS** screen.
  - A **Closed** status is used to note something of importance that does not need to be followed up on. A **Closed** status will not be displayed on the **HOME > ACTIONS** screen.

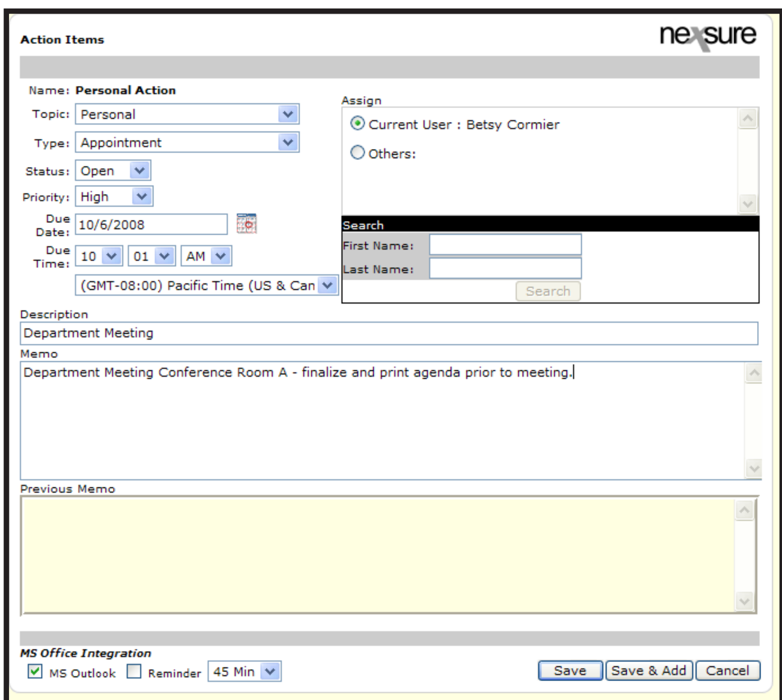
Note: Change the status of an Open Action to Closed when the task is complete.

- The **Priority** of the action will default to either **Normal** or **High** depending on how the priority was associated to the topic in **SETUP > Actions**. Select the appropriate **Priority** from the drop-down box.
  - A **Normal** priority is used if the action is a normal follow up.
  - A **High** priority is used if the action follow up is of extreme importance.
- The **Due Date** of the action will default to the date that was associated to the topic in **SETUP > Actions**. The due date of the action can be changed by using the **Calendar** icon or keying in the date using the correct formatting.
- The **Due Time** will default to 12:01 AM. The action time displayed on the **HOME > ACTIONS** screen can be changed by selecting the appropriate time for the action from the **hour**, **minutes** and **AM/PM** drop-down boxes.

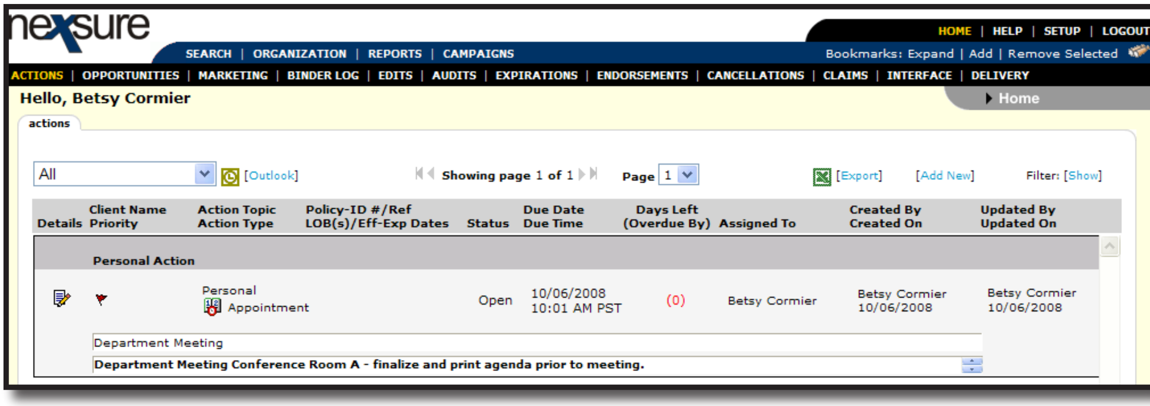
Note: The open action will not appear on the HOME > ACTIONS screen of the user it is assigned to until its designated due date and time.

- The **Time Zone** defaults to the time zone set for the agency. The time zone can be changed by selecting the appropriate time zone for the action from the drop-down box.
- The action will default to the **Current User** creating it. A personal follow up can be assigned to another employee in the agency:
  - Click the **Others** option.
  - Enter at least two characters in both the **First** and **Last** name search fields.
  - Click the **Search** button. If a match is found, the name will be displayed in the assign box next to the **Others** option.
  - Select the **Others** option to assign the action to this user.
  - If a match was not found or the search results returned were incorrect, click the **Requery** button to run a new search.

- Enter a brief description for the action in the **Description** box. This optional field will be copied to the **Memo** box and will display on the action summary. The **Description** box is limited to 95 characters.
  - Enter the action notes in the **Memo** box.
- The **Previous Memo** box displays any previous memos associated to this action. When the **Details** icon of an action is clicked to display the action details, the previously saved **Memo** is automatically moved to the **Previous Memo** section, leaving the **Memo** box empty for new text. Text in the **Previous Memo** box cannot be edited or deleted. The **Description** box remains unchanged unless edited by the user.
- Enter the action notes in the **Memo** box.
- To **Synchronize** this action with Outlook proceed to the **HOW to Synchronize Actions with Outlook** section in this chapter.
- Click the appropriate button at the bottom of the screen:
  - **Save:** This will close the action pop-up window and save the action.
  - **Save & Add:** This will save the action and refresh the action pop-up window to add a new action.
  - **Cancel:** This will close the action pop-up window without saving any information.



- A personal action will display on the **HOME** > **ACTIONS** screen with a **Client Name** of **Personal Action**.

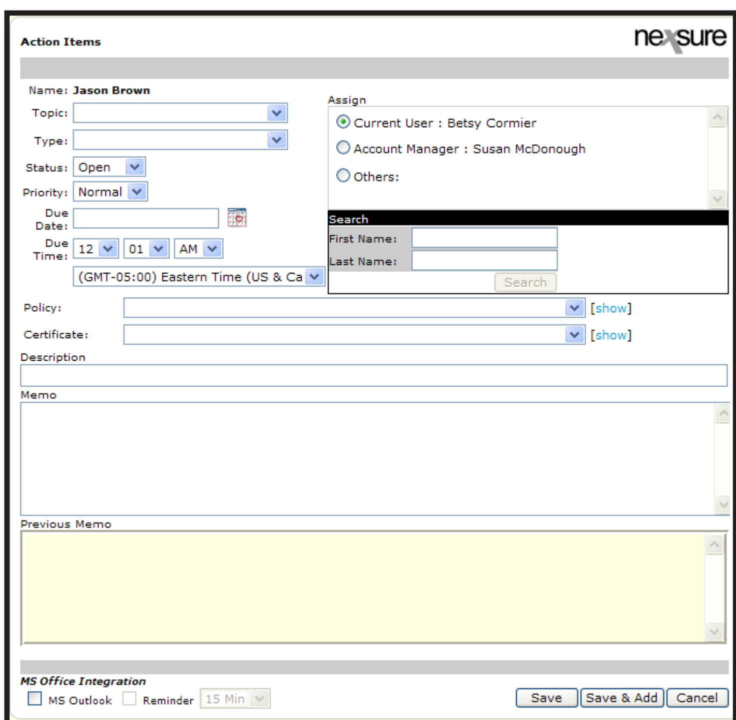


HOW to Add a Client Level Action

- After accessing the appropriate client through **SEARCH**, click the **ACTIONS** link on the **Client** menu. The default **[Show]** filter settings will determine what is displayed in the summary view when clicking the **ACTIONS** link.

Note: Both client and policy level actions will be displayed (based on the filter settings) when clicking the Actions link on the **Client** menu.

- Move the pointer over the **[Add New]** link to display the actions menu. Select **Action** to add a single action. Click **Plan** to choose a plan and add a defined series of actions. See "HOW to Add a New Action Plan" later in this chapter. Select **Action** to display the **Action Items** pop-up window.



- The name of the client will default into the **Name** field at the top of the action. This associates the client to the action being created.
- Select a **Topic** for the action from the drop-down box. Topics are unique and allow grouping of like items together.
- Select a **Type** for the action from the drop-down box. Types are not unique and may be used again for any Topic. Types are associated to Topics in Setup. (See the Admin manual for setup information)
- The **Status** of the action will default to either **Open** or **Closed,** depending on how the status was associated to the topic in **SETUP > ACTIONS**. Select the appropriate **Status** from the drop-down box.
    - An **Open** status is used to create a future follow up for the action. When the action has been completed, the status is changed to closed. A closed action will no longer appear on the **HOME > ACTIONS** screen.
    - A **Closed** status is used to note something of importance that does not need to be followed up on. A **Closed** status will not be displayed on the **HOME > ACTIONS** screen.

Note: The status of an Open action is changed to Closed once the action is completed.

- The **Priority** of the action will default to either **Normal** or **High** depending on how the priority was associated to the topic in **SETUP > ACTIONS**. Select the appropriate **Priority** from the drop-down box.
    - A **Normal** priority is used if the action is a normal follow up.
    - A **High** priority is used if the action is of extreme importance.
- The **Due Date** of the action will default to the date that was associated to the topic in **SETUP > ACTIONS**. The due date of the action can be changed by using the **Calendar** icon or keying in the date using the correct formatting.
- The **Due Time** will default to 12:01 AM. The time the action will appear on the **HOME > ACTIONS** screen can be changed by selecting the appropriate time for the action from the **hour**, **minutes** and **AM/PM** drop-down boxes.

Note: Depending on filter settings, the open action will not appear on the **HOME** > **ACTIONS** screen of the user it is assigned to until its due **Date** and **Time**. For information on filter settings, see "HOW to Search for Actions" and "HOW to Customize Default Filter Settings for Actions" later in this chapter.

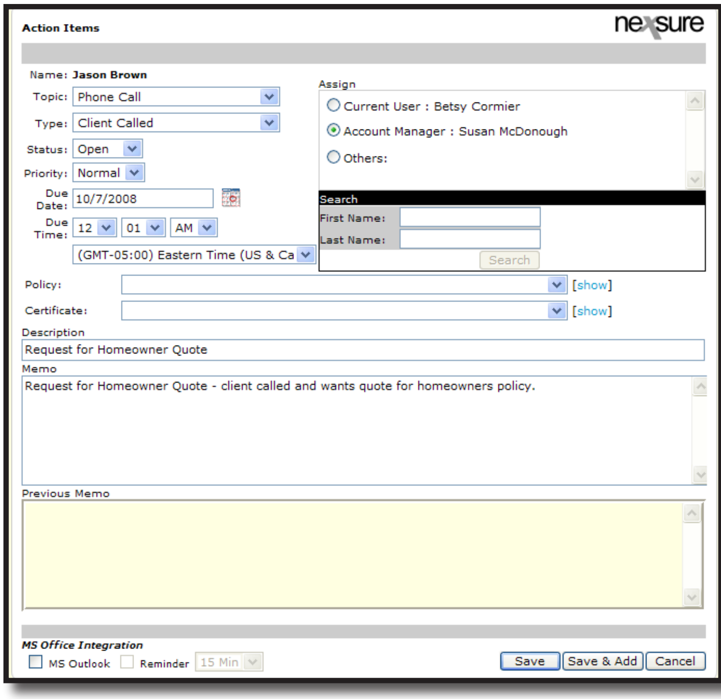
- The **Time Zone** defaults to the time zone set for the agency. The time zone can be changed by selecting the appropriate time zone for the action from the drop-down box.
- The action will default to the **Current User** creating it. Employees of the agency assigned to the client on the **assignment** tab will be displayed in the Assigned field with their designated titles. If the follow up is being created for one of the assigned employees, click the option next to the name of the employee the follow up is being created for. If the person the follow up is being created for is not displayed, perform the following steps:
    - Click the **Others** option.

  - Enter at least two characters in both the **First** and **Last** name search fields.
  - Click the **Search** button. If a match is found, the name will be displayed in the Assign box next to the **Others** option.
  - Select the **Others** option to assign the action to this user.
  - If a match was not found or the search results returned were incorrect, click the **Requery** button to run a new search.
  - If the action added is associated to a **Restricted Access** policy, the action may only be assigned to the people assigned to the policy.

- The **Policy** drop-down box is accessible when creating an action from the **Client** menu. All policies not in history are listed by default. Click the Policy **[Show]** link to search for other policies. After clicking **Search**, the selection list refreshes to list policies that meet the search criteria options. Select the policy to permanently associate with the action.

Note: If the action should be associated to a policy, adding it at the policy level will take the guesswork out of deciding which policy to select from the drop-down box. Employees who are not assigned to a **Restricted Access** policy cannot add actions to the restricted policy from policy level, but they are able to select the **Restricted Access** policy from the **Policy** drop-down box.

- The **Certificate** drop-down box is accessible when creating an action from the **Client** menu. All certificates (posted, un-posted and copied) will be displayed in the drop-down box and can be selected for association to the action. Click the **Certificate [Show]** link to search for certificates by **Cert ID** or **Reference** field. After clicking **Search**, the selection list refreshes to list certificates that meet the search criteria options. Select the certificate to permanently associate to the action.
- Enter a brief description for the action in the **Description** field. This optional field will be copied to the **Memo** field and will display on the action summary. The **Description** field is limited to 95 characters.
  - Enter the action notes in the **Memo** field.
- The **Previous Memo** field displays any previous memos associated to this action. When the **Details** icon of an action is clicked to display the action details, the previously saved **Memo** is automatically moved to the **Previous Memo** section, leaving the **Memo** field empty for new text. Text in the **Previous Memo** box cannot be edited or deleted. The **Description** field remains unchanged unless edited by the user.
- To synchronize this action with Outlook proceed to the **HOW to Synchronize Actions with Outlook** section in this chapter.
- Click the appropriate button at the bottom of the screen:
  - **Save:** This will close the action pop-up window and save the action.
  - **Save & Add:** This will save the action and refresh the action pop-up window to add a new action.
  - **Cancel:** This will close the action pop-up window without saving any information.



HOW to Add a Policy level Action

- After accessing the appropriate client through **SEARCH**, click the **POLICIES** link on the **Client** menu.

Note: To add actions for **OPPORTUNITIES** or **MARKETING** click the **OPPORTUNITIES** or **MARKETING** link on the **Client** menu and the **Details** icon of the Opportunity or Marketing record. To add actions for **Certificates**, click the **certificates** tab from the **policies** summary and the **Details** icon of the certificate. Claims actions are added through Servicing. For information on Claims actions, see Chapter 11, "Claims"..

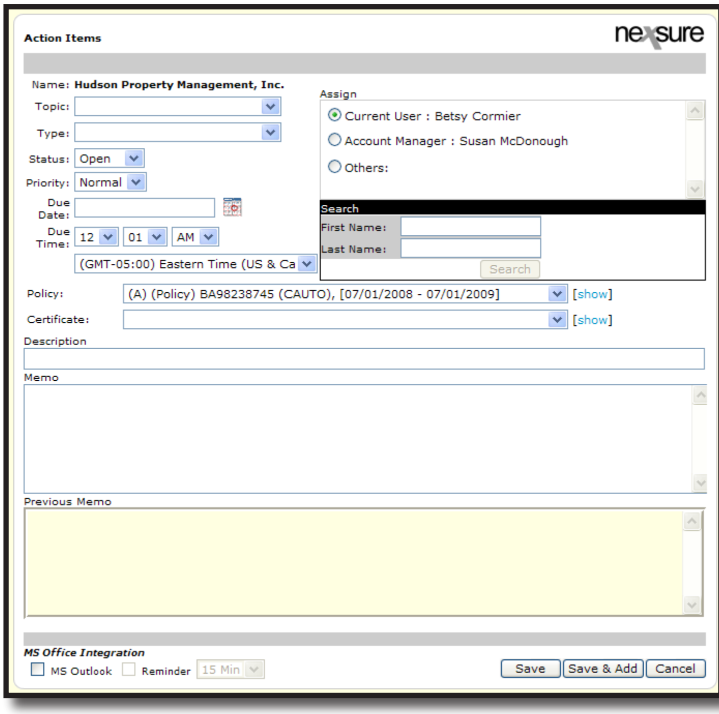
- Click the **Details** icon of the policy the action is being created for.

Note: Employees who are not assigned to a **Restricted Access** policy cannot access the restricted policy from its **Details** icon. Unassigned users can add an action from the **Client** level and select the **Restricted Access** policy from the **Policy** drop-down box.

- Click the **actions** tab. The default **[Show]** filter settings will determine what is displayed in the summary view when clicking the **actions** tab.

Note: Actions attached to the policy will display, depending on the filter settings, when clicking the actions tab of the policy. For information on filter settings, see "HOW to Search for Actions" and "HOW to Customize Default Filter Settings for Actions" later in this chapter.

- Move pointer over the **[Add New]** link to display the actions menu. Select **Action** to add a single action. Click **Plan** to choose a plan and add a defined series of actions. See section "HOW to Add a New Action Plan" later in this chapter. Select **Action** to display the **Action Items** pop-up window.



- By default the name of the client will be entered into the **Name** field at the top of the action. This associates the client to the action being created.
- Select a **Topic** for the action from the drop-down box. Topics are unique and allow grouping of like items together.
- Select a **Type** for the action from the drop-down box. Types are not unique and may be used again for any topic.
- The **Status** of the action will default to either **Open** or **Closed** depending on how the status was associated to the topic in **SETUP > ACTIONS**. Select the appropriate **Status** from the drop-down box.
    - An **Open** status is used to create a future follow up for the action. When the action has been completed, the status is changed to closed, a closed action will no longer appear on the **HOME > ACTIONS** screen.
    - A **Closed** status is used to note something of importance that does not need to be followed up on. A **Closed** status will not be displayed on the **HOME > ACTIONS** screen.

Note: The status of an Open action is changed to Closed once the action is completed.

- The **Priority** of the action will default to either **Normal** or **High** depending on how the priority was associated to the topic in **SETUP > ACTIONS**. Select the appropriate **Priority** from the drop-down box.

- A **Normal** priority is used if the action is a normal follow up.
- A **High** priority is used if the action is of extreme importance.

- The **Due Date** of the action will default to the date that was associated to the topic in **SETUP > ACTIONS**. The due date of the action can be changed by using the **Calendar** icon or keying in the date using the correct formatting.
- The **Due Time** will default to 12:01 AM. The time the action will appear on the **HOME > ACTIONS** screen can be changed by selecting the appropriate time for the action from the **hour**, **minutes** and **AM/PM** drop-down boxes.

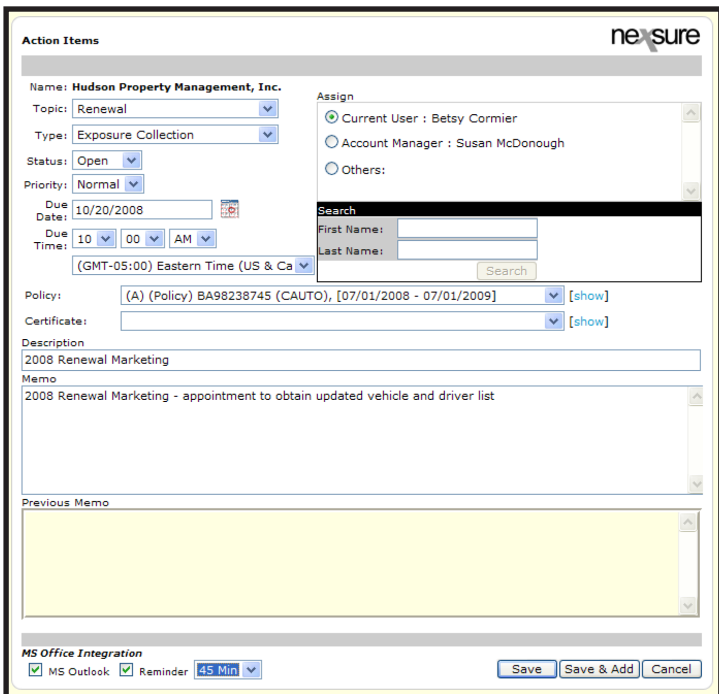
Note: The open action will not appear on the HOME > ACTIONS screen of the user it is assigned to until its due Date and Time.

- The **Time Zone** defaults to the time zone set for the agency. The time zone can be changed by selecting the appropriate time zone for the action from the drop-down box.
- The action will default to the **Current User** creating it. Employees of the agency assigned to the policy on the **assignment** tab will be displayed in the Assigned field with their designated titles. If the follow up is being created for one of the 'assigned employees' click the option next to the name of the employee the follow up is being created for. If the person the follow up is being created for is not displayed, perform the following steps:
  - Click the **Others** option.
  - Enter at least two characters in both the **First** and **Last** name search fields.
  - Click the **Search** button. If a match is found, the name will be displayed in the **Assign** box next to the **Others** option.
  - Select the **Others** option to assign the action to this user.
  - If a match was not found or the search results returned were incorrect, click the **Requery** button to run a new search.
  - If the action added is associated to a **Restricted Access** policy, the action may only be assigned to the people assigned to the policy.
- The **Policy** field will default in the policy number and line of business of the policy accessed. To select a different policy, the **Policy** drop-down box lists all policies for the client that are not in history. Click the policy **[Show]** link to search for other policies. Select the policy to permanently associate to the action.
- The **Certificate** drop-down box is accessible when creating an action from the **POLICIES > actions** tab. All certificates (posted, un-posted and copied) will be displayed in the drop-down box and can be selected for association to the action. Click the **Certificate [Show]** link to search for certificates by **Cert ID** or **Reference** field. After clicking **Search**, the selection list refreshes to list certificates that meet the search criteria options. Select the certificate to permanently associate with the action.
- Enter a brief description for the action in the **Description** field. This optional field will be copied to the **Memo** field and will display on the action summary. The **Description** field is limited to 95 characters.
  - Enter the action notes in the **Memo** field.

- The **Previous Memo** field displays any previous memos associated to this action. When the **Details**  icon of an action is clicked to display the action details, the previously saved **Memo** is automatically moved to the **Previous Memo** section, leaving the **Memo** field empty for new text. Text in the **Previous Memo** box cannot be edited or deleted. The **Description** field remains unchanged unless edited by the user.

- To synchronize this action with Outlook proceed to the **HOW to Synchronize Actions with Outlook** section in this chapter.

- Click the appropriate button at the bottom of the screen:
  - **Save:** This will close the action pop-up window and save the action.
  - **Save & Add:** This will save the action and refresh the action pop-up window to add a new action.
  - **Cancel:** This will close the action pop-up window without saving any information.

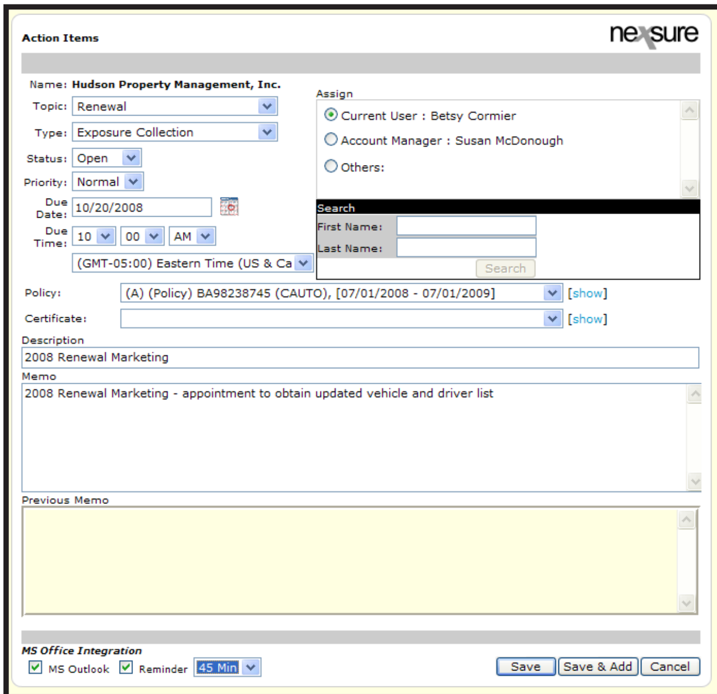


HOW to Synchronize Actions with Outlook

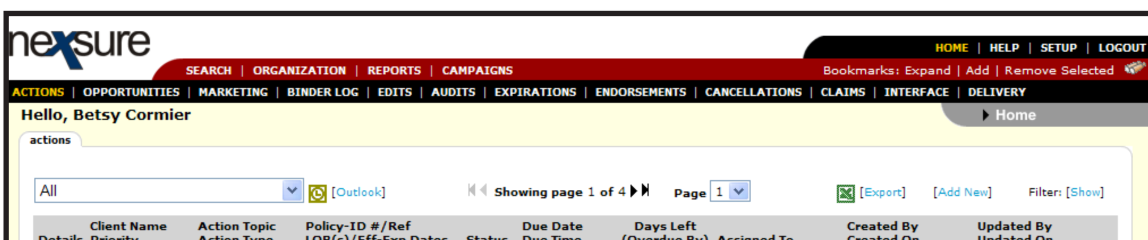
When actions are created or edited the user can synchronize the action with Outlook. To synchronize an action:

- Within the action, click the **MS Outlook** check box in the lower left corner of the action pop-up window to mark this action for MS Outlook synchronization.
  - If the action type icon is a calendar or phone, it is added to the Outlook calendar.
  - Any other Action type is added as a task in Outlook.

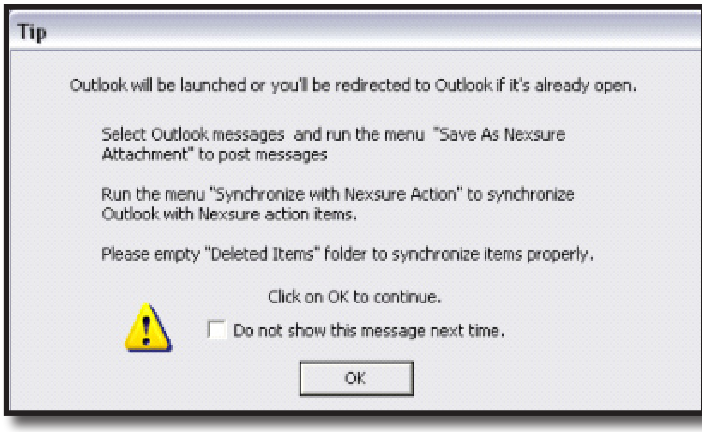
- An Outlook reminder can be set up by clicking the **Reminder** check box. A 15-minute reminder is selected by default. Click the reminder drop-down box to change the time of the Outlook reminder.
- Complete and **Save** the action as appropriate.



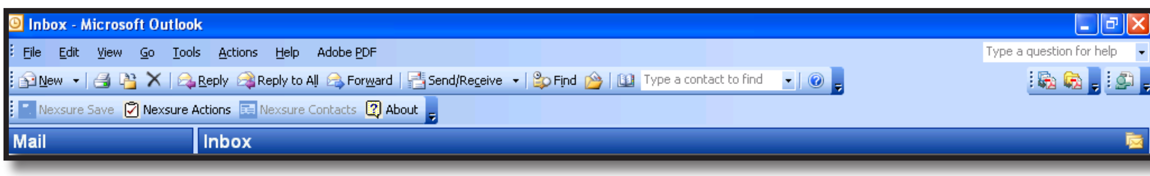
- Once the action has been saved, click the **HOME** link on the **Utility** menu. The **HOME > ACTIONS** screen is displayed.
- Click the **[MS Outlook]** link on the **HOME > ACTIONS** screen.



- If this is the first time of synchronizing actions with Outlook, the following pop-up window will be displayed:



- If you do not want this pop-up window to be displayed every time you synchronize actions, check the **Do not show this message next time** check box. Click **OK**.
- Nexsure will launch Outlook. A Nexsure toolbar is added to Outlook.
- Click the active Nexsure Actions toolbar button.



- The Nexsure Outlook Synchronization pop-up window is displayed. Click **OK** after all items are synchronized.
- The Outlook calendar and/or Outlook tasks will be updated accordingly.

Note: All actions created throughout the day that have been marked for MS Outlook synchronization can be synchronized at one time by clicking the [**MS Outlook**] link on the **HOME** > **ACTIONS** screen.

Notes

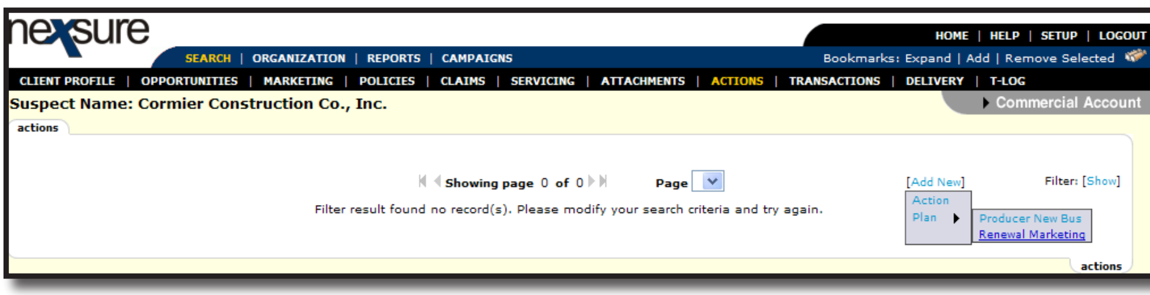
Action Plans

Action Plans are used to automate workflow and help document repetitious tasks by defining a series of actions within a plan. **Actions Plans** are created in **SETUP** > **Actions** by the Nexsure Administrator. Multiple **Action Plans** can be created. For information about setting up **Action Plans**, see "Actions Setup", Chapter 4, *Admin Training Manual*.

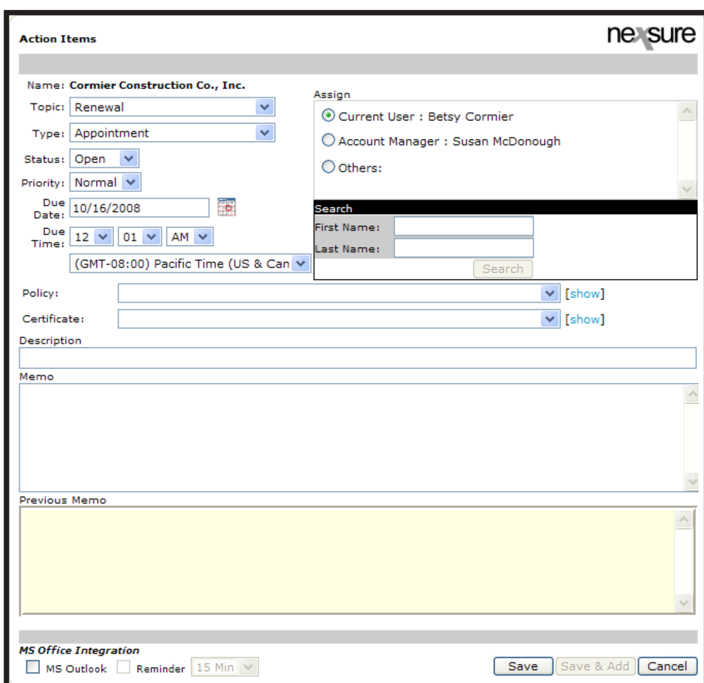
HOW to Add a New Action Plan

Action Plans can be added at all levels of Nexsure. For information about adding actions, see "HOW to Add a Personal Action", "HOW to Add a Client Level Action" or "HOW to Add a Policy Level Action" earlier in this chapter.

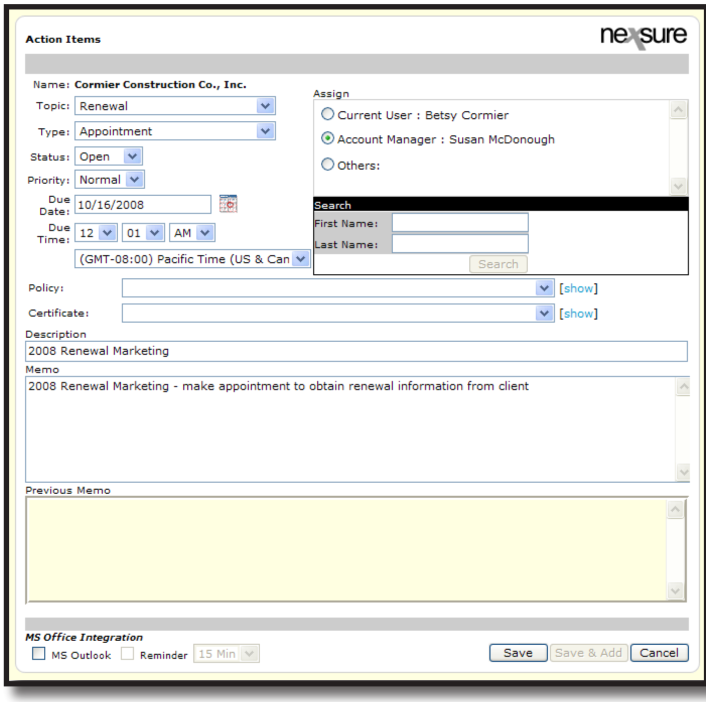
From the **action** summary of the desired level, hover over the **[Add New]** link to display the **actions** menu. Click the **Plan** link to display the list of available plans. Click to select the desired **action plan**.



The first action in the plan displays with default information.



Modify the action as needed. For help completing and modifying the new action, refer to "HOW to Add a Personal Action", "HOW to Add a Client Level Action" or "HOW to Add a Policy Level Action" earlier in this chapter.



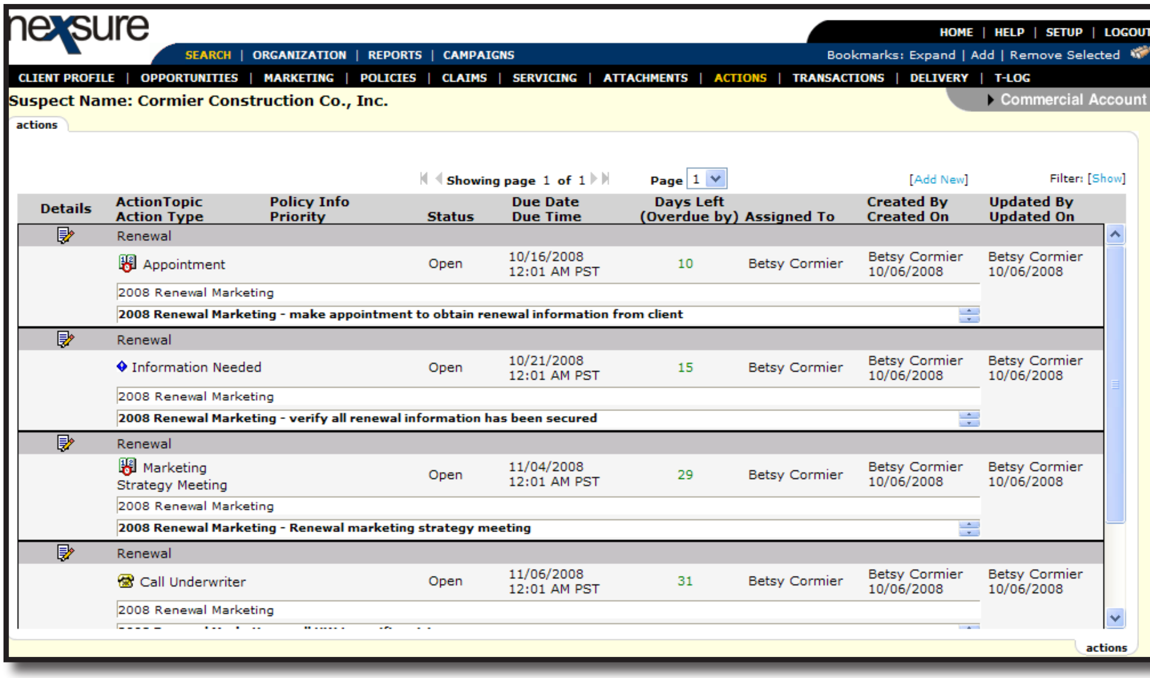
Note: Set up of actions included in the **Action Plan** determines if the **Topic** and **Type** may be modified and if the Cancel button is active. The **Save & Add** button is disabled for all actions added as part of a plan as the next action is predetermined by the plan.

Click the **Save** button to save the action and display the next action in the sequence. Clicking **Cancel** will abort the new action and the rest of the **action plan**.

Note: Clicking the **Cancel** button cancels the **action plan**. If one action in a plan is not needed, change the Status to closed, explain the reason the action is closed in the **Memo** field and **Save** the closed action to continue with the **action plan**. If the currently displayed action is canceled, all remaining actions in the **action plan** are aborted.

Modify the second action as needed. The default **Due Date** of each sequential action in the plan is based on the due date of the preceding action in the series. Click the **Save** button to save the second action and display the next action in the sequence. Continue modifying and saving each action until the last action in the plan is saved.

When the last action in the plan is saved, the action summary is displayed. Filter settings determine what is displayed on the action summary.



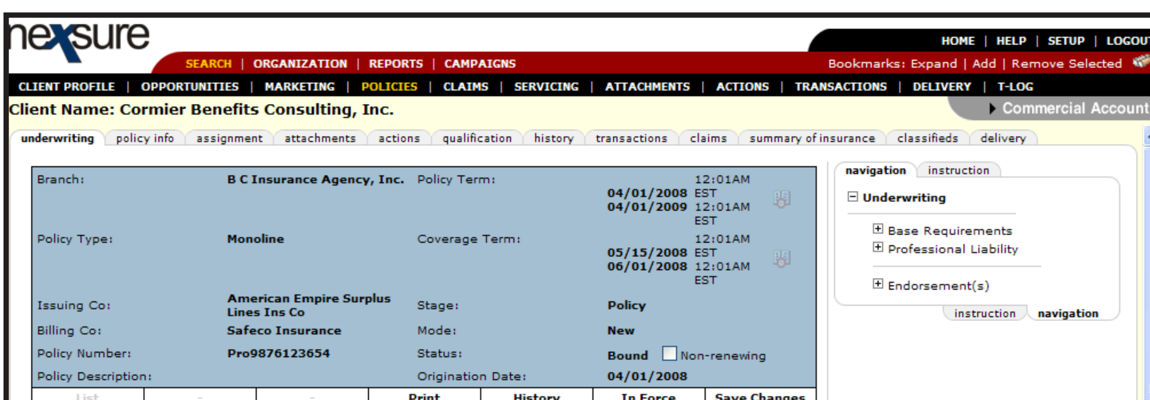
Actions added through an **action plan** are independently maintained once they are saved.

Action Triggers

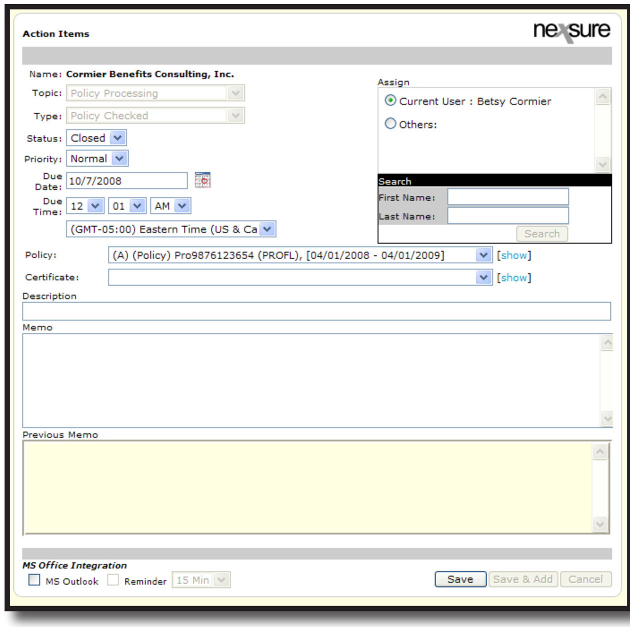
Action Triggers create an action when a policy is placed **In Force** from a **Bound**, **Future**, **Expired** or **Marketing** stage. **Actions Triggers** are optional and are setup in **SETUP** > **Actions** by the Nexsure administrator. For information about setting up **Action Triggers**, see "Actions Setup", Chapter 4, *Admin Training Manual*.

HOW to Use Action Triggers

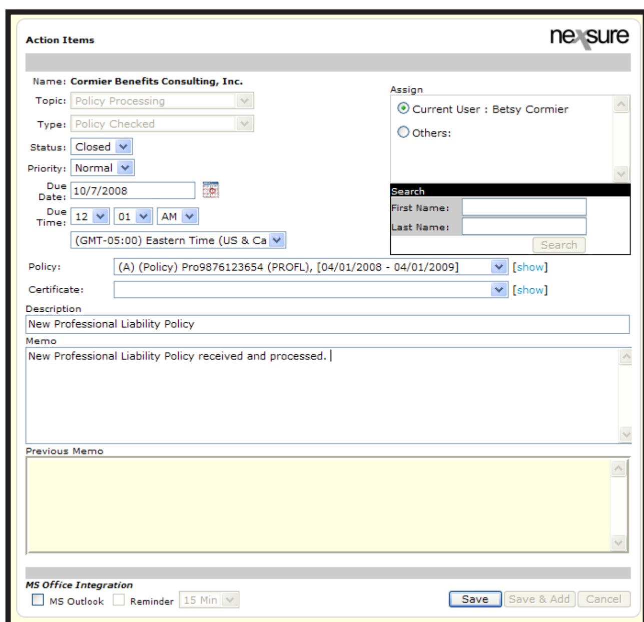
Click the active **In Force** link of a marketing record or a policy with a **Status** of **Bound**, **Future** or **Expired**.



The **action** determined in setup to be triggered by clicking the **In Force** link is launched and displays with default information. Modify the action as needed.



Note: Set up of the **Action Trigger** determines if the **Topic** and **Type** may be modified and if the **Cancel** button is active. The **Save & Add** button is disabled for all actions used as **Action Triggers**.



Click the **Save** button to save the action. If the option is available, clicking **Cancel** will abort the new action. The action originally associated with the policy is not affected by placing it **In Force** and continues to display under the policy header. The triggered action is saved and may be accessed from the policy **actions** tab or **ACTIONS** on the **Client** menu.

Editing Actions

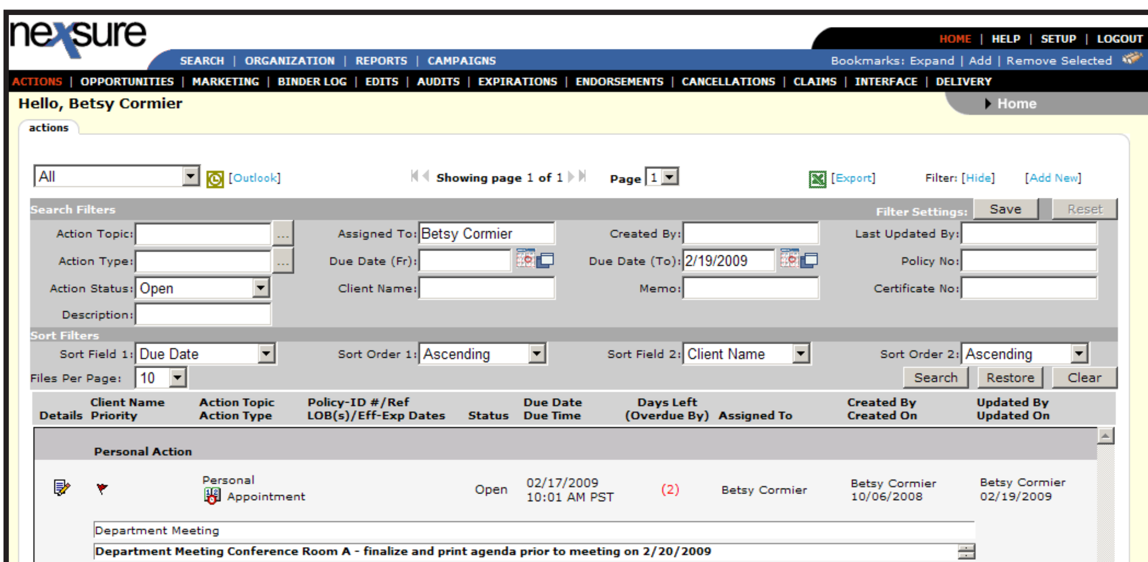
All levels of actions can be edited if needed and/or re-suspended if the follow up date changes.

HOW to Edit Actions

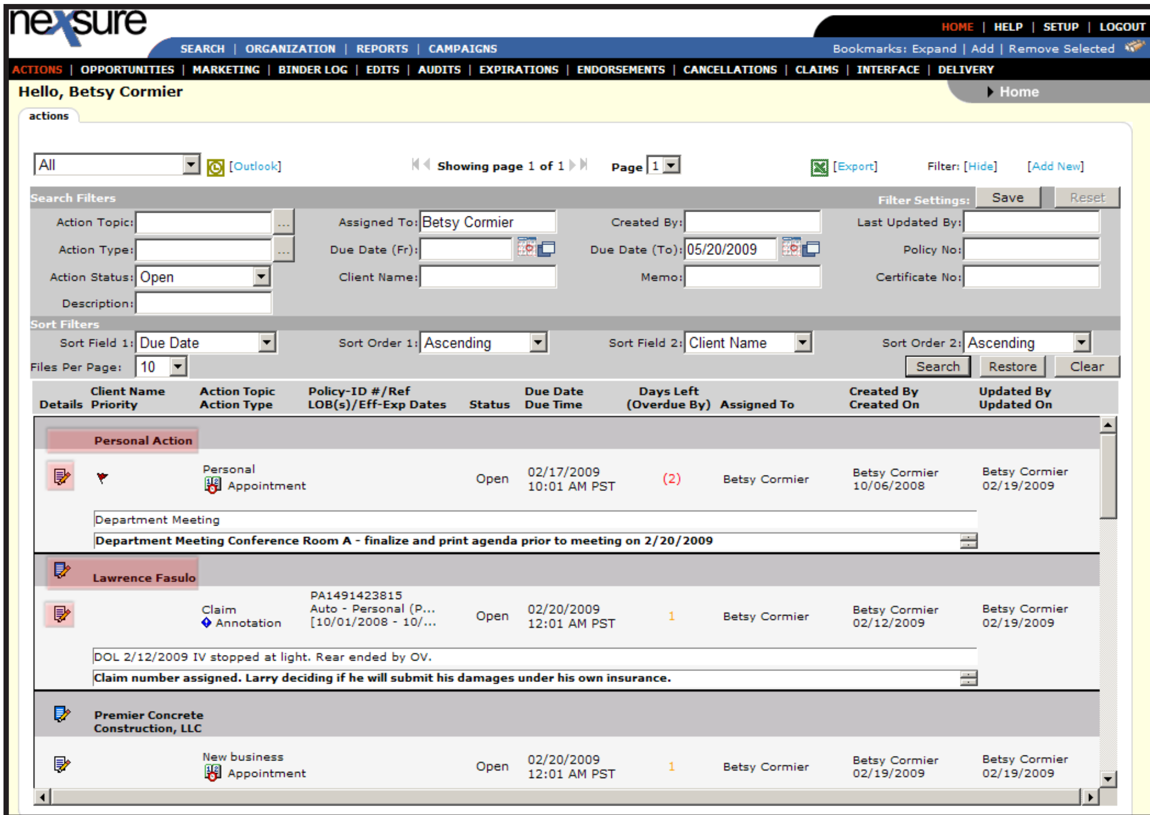
The **HOME > ACTIONS** screen is the first screen displayed when logging into Nexsure. Actions due today, or in the past that have not been completed, display in a summary view.

> **Note:** All actions, Open, Closed, Personal, Client and Policy level, can be viewed and accessed from the **HOME > ACTIONS** screen by entering the applicable information in the **[Show]** filter. Search results will display actions for a restricted policy only if the person logged on is assigned to the restricted policy.

- Click the **HOME** link on the **Utility** menu. All open actions assigned to the logged on user due today or in the past that have not been completed and fall within the search filter criteria will be displayed in a summary view.
- If the action to be edited is not displayed, click the **[Show]** filter link on the **HOME > ACTIONS** screen. Enter the applicable search criteria of the action to be edited. Note: For information on using search filters, see "HOW to Search for Actions" and "HOW to Customize Default Filter Settings for Actions" later in this chapter.

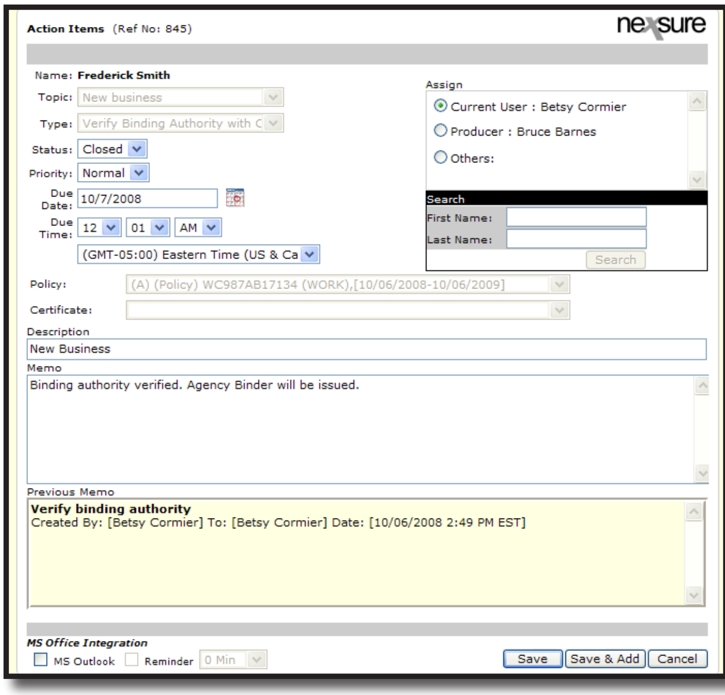


- Click the **Search** button. All actions falling within the search criteria display in a summary view. Click the filter **[Hide]** link to close **Search Filter** criteria if an additional search is not needed.



- **Personal Actions** are displayed with one **Details** icon.
  - Clicking the **Details** icon will display the personal action.
- **Client** or **Policy** level actions are displayed with two **Details** icons.
  - Clicking the **Details** icon with the blue border displays the card file for the client.
  - Clicking the second **Details** icon displays the **Action** pertaining to the client or the policy.
- Click the **Details** icon of the appropriate action to edit.
- If the action was created from the client or policy level, the client's name is displayed in the name field and cannot be changed.
- The **Topic** and **Type** of action are displayed.
  - The **Topic** and **Type** of an action are locked down and cannot be changed.
- The Status will display as **Open** or **Closed**. A memo can be added to an action in a **Closed** status without changing the status to open. The status can also be changed back and forth between Open and Closed as needed.

Note: The Status of all actions can be change from Open to Closed and back again an unlimited number of times. You can also add a memo to a closed action. This eliminates the need to create a new action to address an existing or past issue.



- The **Priority** of the Action will be displayed as **Normal** or **High**. The status can be changed back and forth as needed when editing.
  - A **Normal** priority is used if the action is a normal follow up.
  - A **High** priority is used if the action is of extreme importance.
- The **Due Date** of the action will default to the last due date associated to the action. The due date of the action can be changed by using the **Calendar** icon or keying in the date using the correct formatting.
- The **Due Time** of the action will default to the last due time associated to the action. The due time of the action can be changed by selecting the appropriate time for the action from the **hour**, **minutes** and **AM/PM** drop-down boxes.

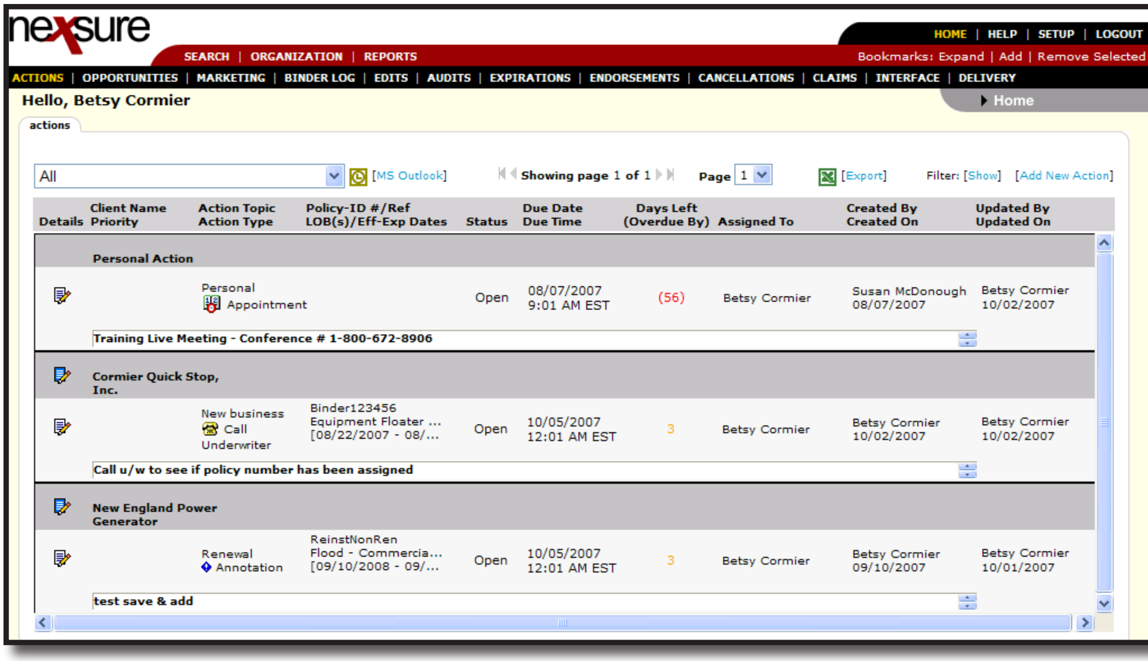
Note: The open action will not appear on the **HOME > ACTIONS** screen of the user it is assigned to until its Due Date and Time unless the **[Show]** filters default settings have been altered.

- The **Time Zone** of the action will default to the last time zone associated to the action. The time zone can be changed by selecting the appropriate time zone for the action from the drop-down box.

- The action will default to the last user the action was assigned or the current user accessing it. If the follow up is being created for one of the assigned employees, click the option next to the name of the employee the follow up is being created for. If the person the follow up is being created for is not displayed, perform the following steps:
    - Click the **Others** option.
    - Enter at least two characters in both the **First** and **Last** name search fields.
    - Click the **Search** button. If a match is found, the name will be displayed in the Assign box next to the **Others** option.
    - Select the **Others** option to assign the action to this user.
    - If a match was not found or the search results returned were incorrect, click the **Requery** button to run a new search.
    - If the action added is associated to a **Restricted Access** policy, the action may only be assigned to the people assigned to the policy.
- If the action was created from or attached to a policy, the policy number relating to the action is displayed in the policy field. This cannot be changed.
- If a certificate was attached to the action, it will be displayed in the certificate field and cannot be changed.
- Edit the **Description** if applicable.
    - Enter the current Action notes in the **Memo** field. The previously saved **Memo** is automatically moved to the **Previous Memo** section, leaving the **Memo** field empty for new text. Text in the **Previous Memo** box cannot be edited or deleted.
- The **Previous Memo** field displays any previous memos associated to this action.
- To **Synchronize** this action with Outlook, proceed to the **HOW to Synchronize Actions with Outlook** section in this chapter.
- Click the appropriate button at the bottom of the screen:
    - **Save:** This will close the action pop-up window and save the action.
    - **Save & Add:** This will save the action and refresh the action pop-up window to add a new action.
    - **Cancel:** This will close the action pop-up window without saving any information.

HOW to Use the Home – Actions Summary Screen

- Click the **HOME** link on the **Utility** menu.
- The three levels of actions, (Personal, Client or Policy) that fall within the search filter criteria are displayed in a summary view.



- If you have access to multiple branches, selecting a **Branch** from the drop-down box will narrow down the search results.
- The **[MS Outlook]** link is used to synchronize Nexsure actions with a user's Outlook calendar or Outlook tasks. Proceed to **HOW to Synchronize Actions with Outlook** in this chapter.
- Nexsure displays ten actions per page. If there are more than ten actions, the Navigation paging links at the top of the actions screen will be active. Use the paging links or the page drop-down box to navigate to the additional pages.

Note: The default **[Show]** filter settings will determine what is displayed in the summary view when clicking the Actions link on the **Home** menu, **Client** menu or **actions** tab at the policy level. For information on using search filters, see "HOW to Search for Actions" and "HOW to Customize Default Filter Settings for Actions" later in this chapter.

- Click the **[Show]** filter to display the search criteria used. If the search criteria is incorrect, change the **Search** criteria and click the **Search** button to initiate a new search. Search results will display actions for a restricted policy only if the person logged on is assigned to the restricted policy.
- **Personal Actions** are displayed with one **Details** icon.
  - Clicking the **Details** icon will display the personal action.
- **Client** and **Policy** level Actions are displayed with two **Details** icons.
  - Clicking the **Details** icon with the blue border displays the card file for the client.
  - Clicking the white **Details** icon displays the action pertaining to the client or policy.
- If the action was created from the Client or Policy level, the client's name will be displayed in the Gray line.

- A **red flag** icon (displayed under the client's name on the Actions Summary screen) indicates this action has a high level of priority.
- The Action **Topic** and **Type** will be displayed.
  - **Topics** are unique and allow grouping of like items together.
  - **Types** are the description of the action. Any icons displayed to the left of the topic were selected when the Actions were created in **Setup.**
- If the action was created from the **policy level actions** tab, the **policy number**, **line of business** and **effective date** will be displayed.
- The **Status** of the Action is displayed as either:
  - **Open** meaning follow up is required for the action –or-
  - **Closed** meaning the follow up has been completed on this action.
- The **Due Date** is the date the action will appear for follow up on the **HOME > ACTIONS** screen.
- The **Due Time** is the time the action will appear on the **HOME > ACTIONS** screen.

Note: If more than one action is due on the same day, a due time can be assigned to each action to address each action in chronological order.

- The **Days Left (Over Due By)** displays a countdown of days the action is due or overdue. The number will be displayed in one of three colors and will change accordingly:
  - **Green** indicates more than five days before the due date.
  - **Orange** indicates five days or less before the due date.
  - **Red** indicates the number of days past the due date.
- The action will be displayed on the **Assigned To** users **HOME > ACTIONS** screen on its due date and time.
- **Created By / Created On** displays the user and the date the action was created.
- **Updated By / Updated On** displays the user and the time the action was last updated.
- Clicking in the memo portion of the action (which is the last line in the summary of each action) displays all notes, users, dates and times the action has been posted to.

Notes

Closing and Reopening Actions

When an action follow up is completed, the status of the action should be changed to closed. The action will be saved as a permanent record at level the action was created from. If an action has been completed and closed and it is later discovered that further follow up is needed a closed action can be reopened. This eliminates the need to create a new action to address an existing or past issue.

All actions, both open and closed, can be accessed from the **HOME > ACTIONS** screen.

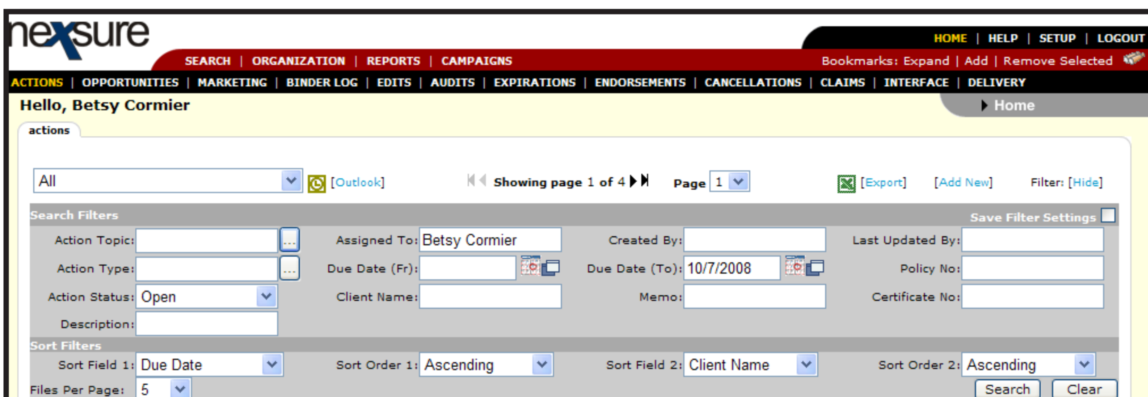
Note: The **Status** of all actions can be change from **Open** to **Closed** and back again an unlimited number of times. You can also add a memo to a closed action. This eliminates the need to create a new action to address an existing or past issue.

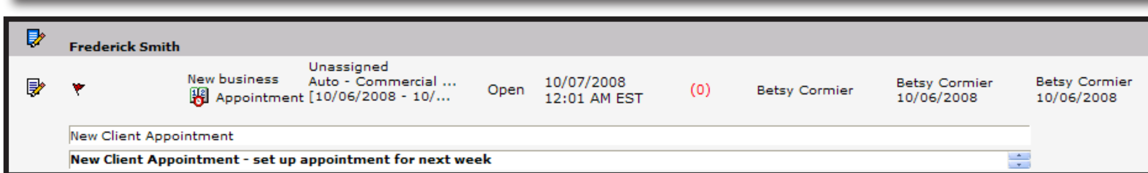
HOW to Close an Action

- Click the **HOME** link on the **Utility** menu.
- If an action is due today or past due, and the follow up has not completed, it will be displayed in a summary view. If the action is suspended out into the future, click the **[Show]** filter to display the search criteria. Enter information applicable to the action being searched for. If the action pertains to a client or policy, be sure to enter the client's name and/or policy number. The more information entered in the search filter, the more refined the search results will be. For more information on searching for Actions, see "HOW to Search for Actions" later in this chapter.

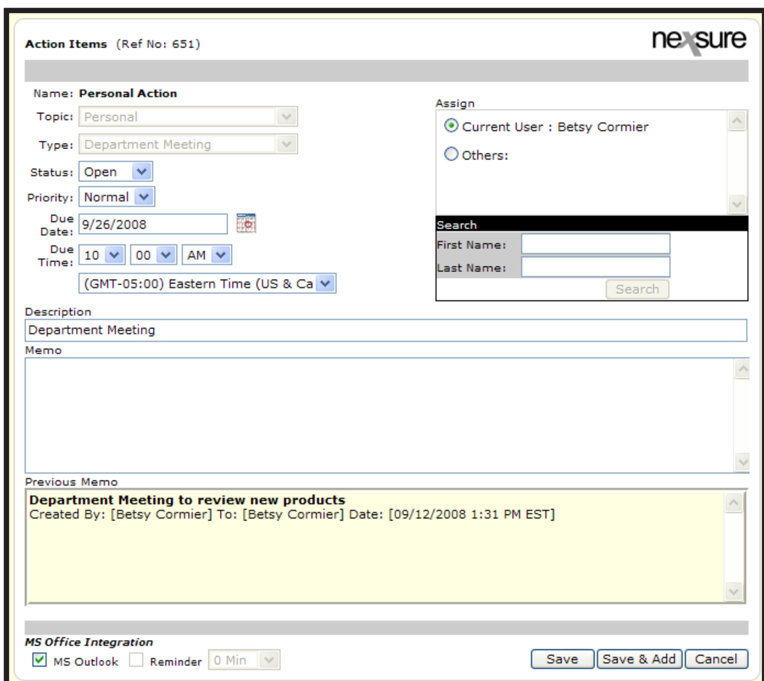
Note: An action with a future follow up date can be closed if the action is completed before it's due to appear on the **HOME** > **ACTIONS** screen for follow up.

- Click the **Search** button.



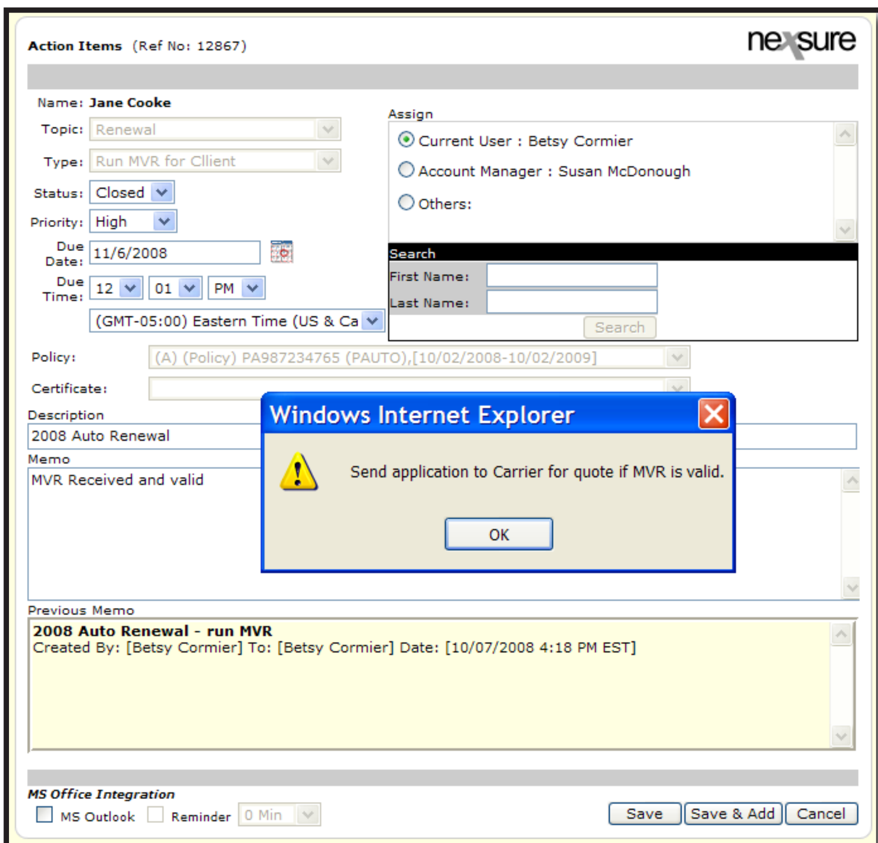


- All actions that fall within the search criteria entered will be displayed. Search results will display actions for a restricted policy only if the person logged on is assigned to the restricted policy.
- **Personal Actions** are displayed with one **Details** icon.
  - Clicking the **Details** icon will display the personal action.
- **Client** or **Policy** level actions are displayed with two **Details** icons.
  - Clicking the **Details** icon with the blue border, displays the card file for the client.
  - Clicking the white **Details** icon displays the **Action** pertaining to the client or policy.
- Click the **Details** icon of the completed action to close.
- If the action was created from the client level, the client's name is displayed in the name field and cannot be changed.
- The **Topic** and **Type** of action are displayed.
- The **Status** will display as **Open**. Change the status in the drop-down box to **Closed**.

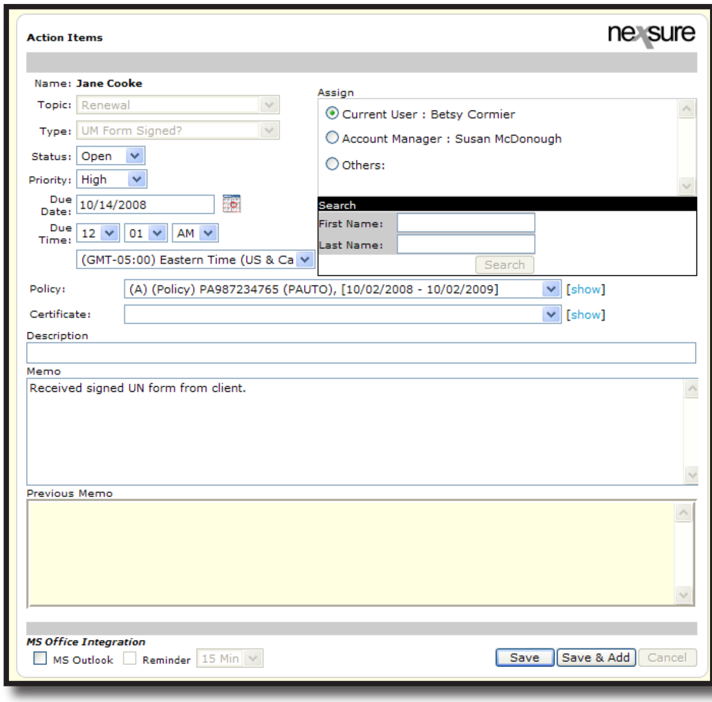


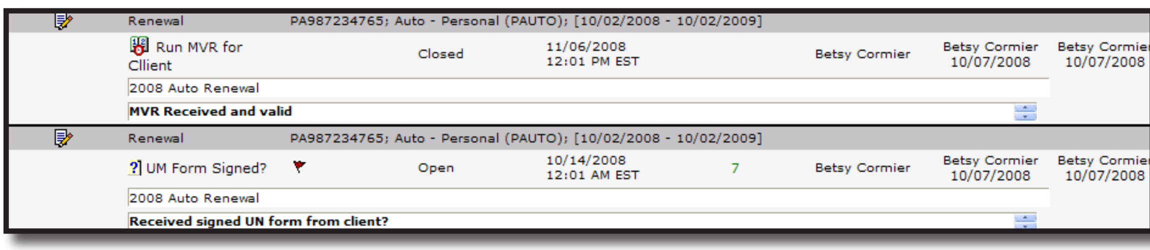
- Because the action is being closed:
  - The **Priority, Due Date, Due Time, Time Zone, User Assigned** and the synchronization process will default to the last selection made on the action. These items do not need to be changed.
- If the action was created from, or attached to a policy, the policy number relating to the action is displayed in the policy field. This cannot be changed.

- If a certificate was attached to the action it will be displayed in the certificate field and cannot be changed.
- Enter the reason the action is being closed in the in the **Memo box.** Edit the Description box if necessary.
- The **Previous Memo** box displays any previous memos associated with this action. Text in the **Previous Memo** box cannot be edited or deleted.
- Click the appropriate button at the bottom of the screen:
    - **Save:** This will close the action pop-up window and save the action.
    - **Save & Add:** This will save the action and refresh the action pop-up window to add a new action.
    - **Cancel:** This will close the action pop-up window without saving any information.
- Actions may be setup to display an **Alert** when the action is being closed. Click **OK** to close the alert message and continue.



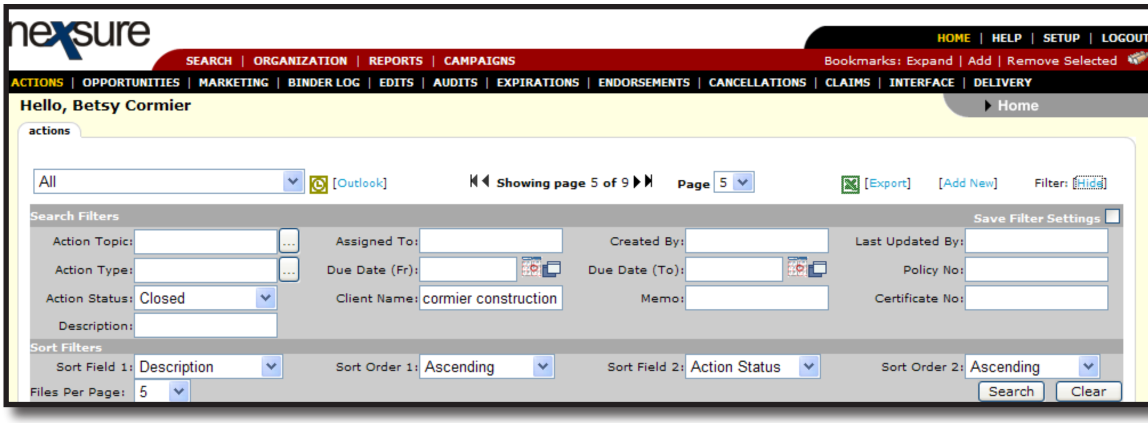
- Closing an action may display a predetermined subsequent action. The subsequent action displays with a default memo in the action's memo section. The subsequent, or linked, action must be saved. Setup of the linked action determines if the user is allowed to **Cancel**, or modify the **Topic** and **Type** of the action before it is saved.



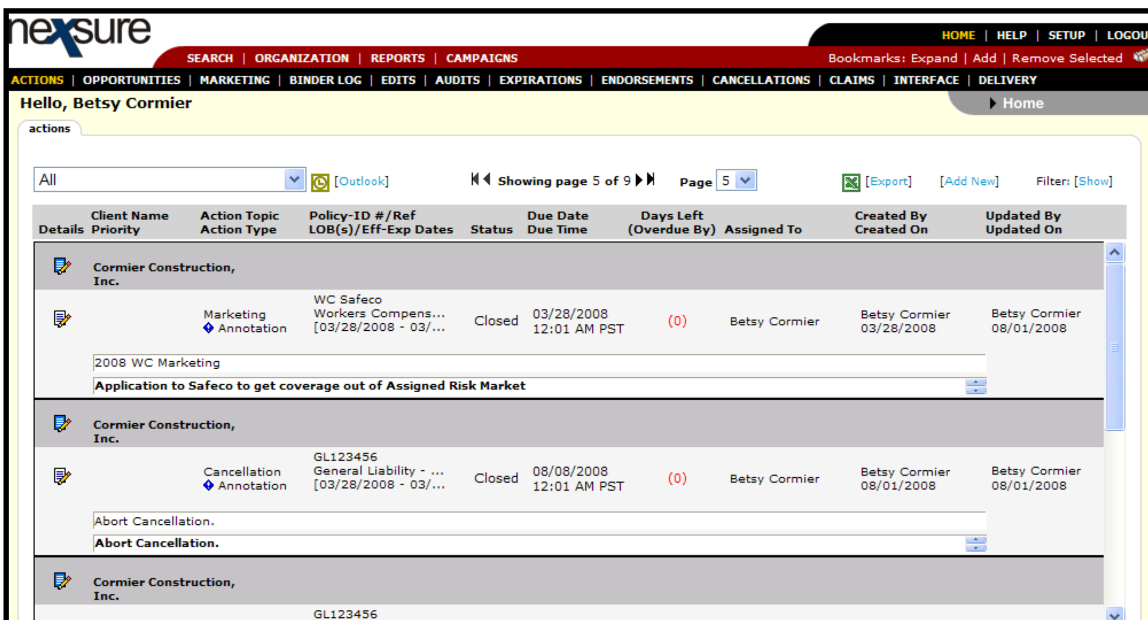


HOW to Reopen an Action

- Click the **HOME** link on the **Utility** menu.
- Click the **actions [Show]** filter to display the search criteria. Enter information applicable to the closed action being searched for. If the action was pertaining to a client or policy, make sure to enter the client's name and/or policy number. When searching for a closed action, change the action status drop-down box to **Closed**. The more information entered in the search filter, the more refined the search results will be. For more information on searching for Actions, see "HOW to Search for Actions" later in this chapter.
- Click the **Search** button.

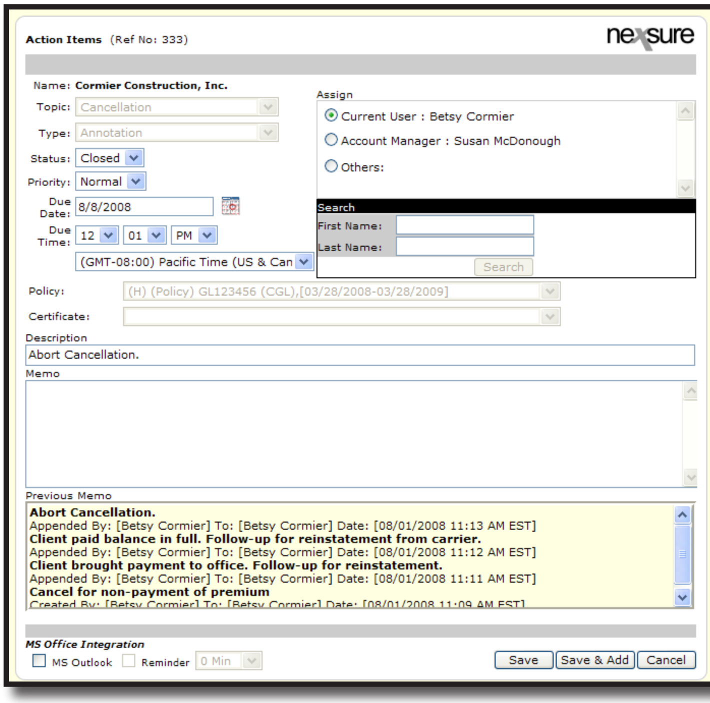


- All actions that fall within the search criteria entered will be displayed. Search results will display actions for a restricted policy only if the person logged on is assigned to the restricted policy.
- If the search results returned were incorrect, click the **Clear** button, change the search criteria and click the **Search** button to initiate a new search.

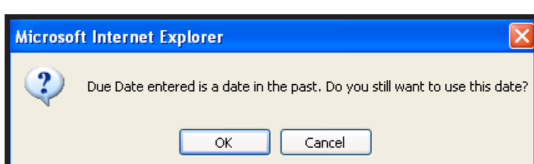


- **Personal Actions** are displayed with one **Details** icon.
  - Clicking the **Details** icon will display the personal action.
- **Client** or **Policy** level actions are displayed with two **Details** icons.
  - Clicking the **Details** icon with the blue border displays the card file for the client.
  - Clicking the white **Details** icon displays the action pertaining to the client or the policy.

- Click the **Details** icon of the closed action to be reopened.



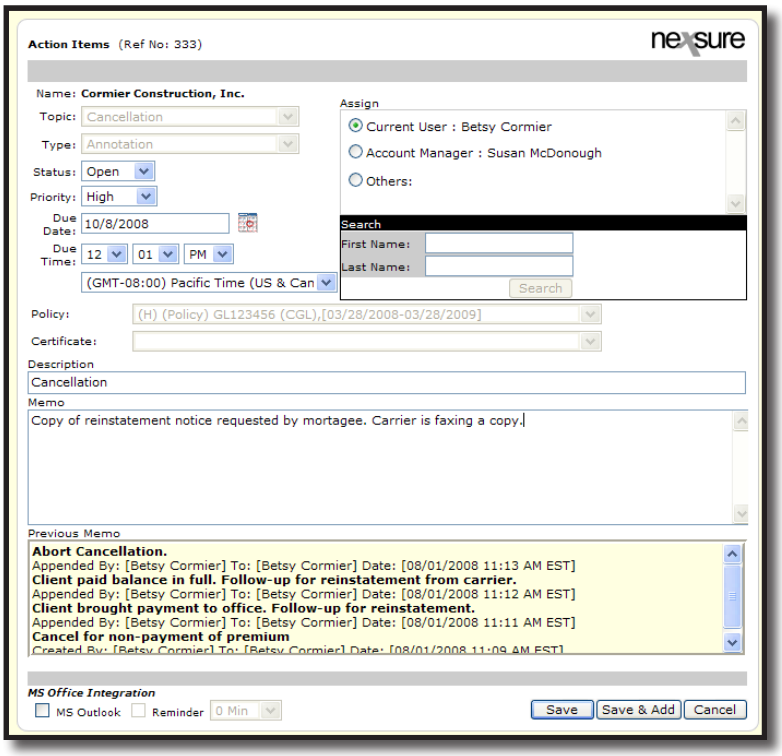
- If the action was created from the Client level, the client's name is displayed in the name field. This cannot be changed.
- The **Topic** and **Type** of action are displayed. The **Closed** status locks down the topic and type, after reopening and saving the action, the topic and type may be changed.
- The **Status** will be displayed as **Closed**, change the status in the drop-down box to **Open**.
- The **Priority** of the action will default to the last priority associated with the action. Select the appropriate **Priority** from the drop-down box.
  - A **Normal** priority is used if the action is a normal follow up.
  - A **High** priority is used if the action is of extreme importance.
- The **Due Date** of the action will default to the last due date associated with the action. The due date of the reopened action should be changed. Use the **Calendar** icon or key in the new due date using the correct formatting. If the due date has passed and is not changed, a pop-up window will be displayed when saving the action notifying the user of the past date. Click **OK** to use the past date or click **Cancel** to go back and enter a new due date.



- The **Due Time** will default to the last due time associated to the action. The time will be displayed on the **HOME > ACTIONS** screen can be changed by selecting the appropriate time for the action from the **Hour**, **Minutes** and **AM/PM** drop-down boxes.

Note: The open action will not appear on the **HOME** > **ACTIONS** screen of the user it is assigned to until its **Due Date** and **Time** unless the **[Show]** filters default settings have been altered.

- The **Time Zone** defaults to the last time zone associated with the action. The Time Zone can be changed by selecting the appropriate time zone for the action from the drop-down box.



- The action will default to the last user the action was assigned to or the current user accessing it. If the follow up is being created for one of the assigned employees, click the option next to the name of the employee the follow up is being created for. If the person the follow up is being created for is not displayed, perform the following steps:
  - Click the **Others** option.
  - Enter at least two characters in both the **First** and **Last** name search fields.
  - Click the **Search** button. If a match is found the name will be displayed in the Assign box next to the **Others** option.
  - Select the **Others** option to assign the action to this user.
  - If a match was not found or the search results returned were incorrect, click the **Requery** button to run a new search.
  - If the action added is associated to a **Restricted Access** policy, the action may only be assigned to those users assigned to the policy.

- If the action was created from or attached to a policy, the policy number relating to the action is displayed in the policy field and cannot be changed.
- If a certificate was attached to the action it will be displayed in the certificate field and cannot be changed.
- Enter the action notes in the **Memo** field. Edit the **Description** if applicable.
- The **Previous Memo** box displays any previous memos associated to this action. Text in the **Previous Memo** box cannot be edited or deleted.
- To synchronize this action with Outlook proceed to the **HOW to Synchronize Actions with Outlook** section in this chapter.
- Click the appropriate button at the bottom of the screen:
    - **Save:** This will close the action pop-up window and save the action.
    - **Save & Add:** This will save the action and refresh the action pop-up window to add a new action.
    - **Cancel:** This will close the action pop-up window without saving any information.

Notes

Tracking Actions

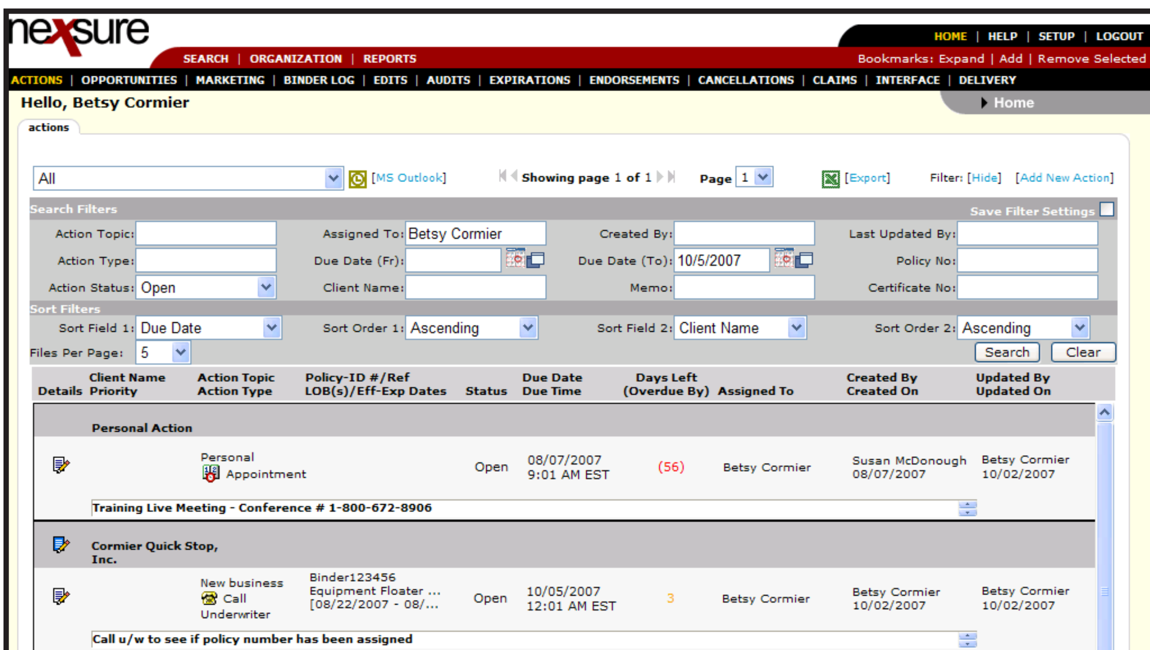
Open and closed actions can be tracked from the **Home** menu, **Client** menu or from the policy level. The **Home** menu, depending on your filter settings, can display all open and closed actions for the agency. The **Client** menu will display actions associated to the client and policy level. The policy level will display actions associated only to the policy accessed.

Note: For information on default Search Filter settings for Actions, see "HOW to Search for Actions" and "HOW to Customize Default Filter Settings for Actions" later in this chapter.

How to Track Actions From the Home Menu

The **HOME > ACTIONS** link serves as a way to keep track of all actions due today or in the past, that have not yet been completed. Actions will appear in a summary view. The **Home** menu is accessible by clicking the **HOME** link on the **Utility** menu in the upper right hand corner of the screen. The **HOME > ACTIONS** screen will be the first screen displayed.

Note: If the action is suspended out into the future or closed, it will not appear on the **HOME** > **ACTIONS** link unless the [Show] filters default settings have been altered to allow these actions to be displayed.



- Clicking the **ACTIONS** link on the **Home** menu displays all personal, client and policy level actions due today or in the past, based on the settings selected and saved in the **[Show]** filter. To change what is displayed, click the **[Show]** filter, change the search criteria and click the **Search** button to initiate a new search.

- **Personal Actions** are displayed with one **Details**  icon.

- Clicking the **Details** icon will display the personal action.

- **Client** or **Policy** level actions are displayed with two **Details** icons.
    - Clicking the **Details** icon with the blue border displays the card file for the client.
    - Clicking the white **Details** icon displays the action pertaining to the client or the policy.
- Clicking the **Details** icon of the action displays the **Action** pop-up window for the selected action.

HOW to Track Actions From the Client Menu

- Access the appropriate entity through **SEARCH.**
- Clicking the **ACTIONS** link on the **Client** menu displays both client and policy level actions due today or in the past, based on the configured and saved **[Show]** filter settings. To change what is displayed, click the **[Show]** filter, change the search criteria and click the **Search** button to initiate a new search. Search results will display actions for a restricted policy only if the person logged on is assigned to the restricted policy.
- If the action was created from the **policy level actions** tab, the **Policy Number**, **Line of Business** and **Effective Date** display in the summary view.
- Clicking the **Details** icon of the action displays the **Action** pop-up window for the selected action.

HOW to Track Actions From the Policy Level

- After accessing the appropriate client through **SEARCH**, click the **POLICIES** link on the **Client** menu.
- Click the **Details** icon of the policy the Action applies to.
- Clicking the **actions** tab displays policy level actions due today or in the past, based on the settings selected and saved using the **[Show]** filter. To change what is displayed, click the **[Show]** filter, change the search criteria and click the **Search** button to initiate a new search.
- Clicking the **Details** icon of the action displays the **Action** pop-up window for the selected action.

HOW to Search for Actions

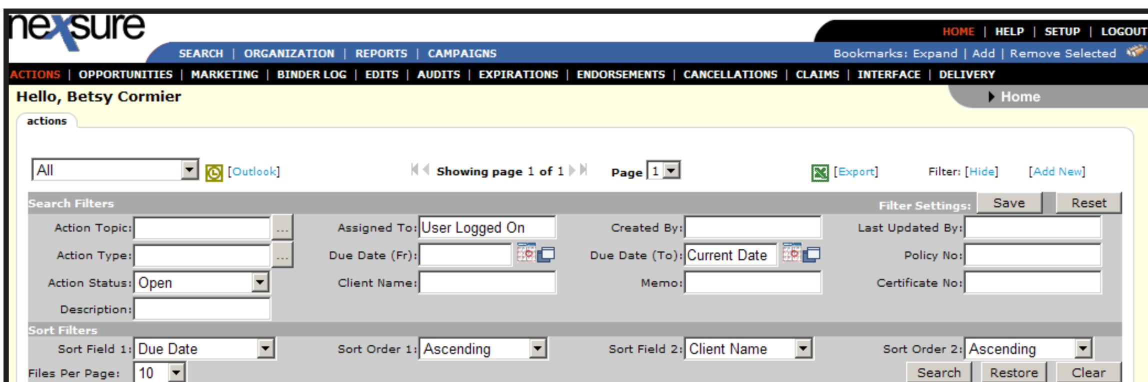
Actions can be viewed at **HOME** > **ACTIONS**, **Client** menu > **ACTIONS** and policy actions. See "HOW to Use the Home – Actions Summary Screen", "HOW to Track Actions From the Home Menu", "HOW to Track Actions From the Client Menu" and "HOW to Track Actions From the Policy Level" to understand how to access Actions at each level.

The summary view of Actions accessed at each level is determined by the default filter settings for that view of Actions. The Nexsure default view of Actions displays Open Actions assigned to the logged on User due through the current date. Actions are displayed ten (10) items per page in **Ascending** order by **Due Date**, alphabetically by **Client Name**.

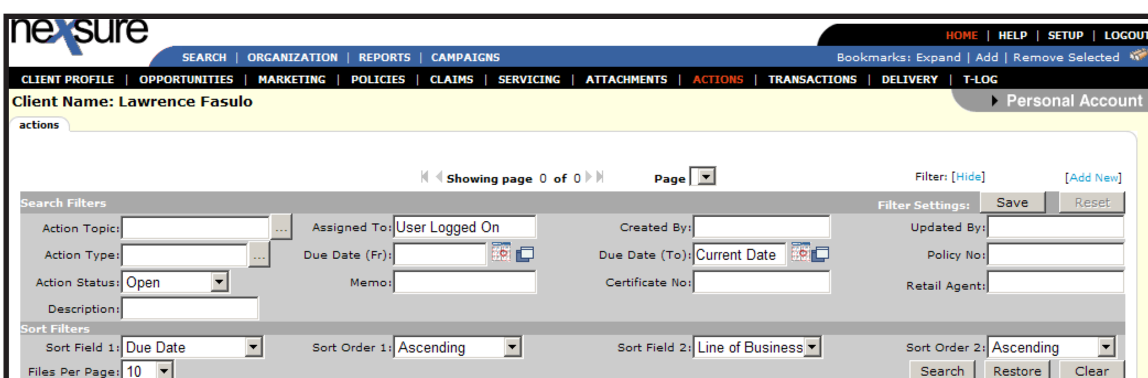
Note: Search results will display Actions for a restricted policy only if the person logged on is assigned to the restricted policy.

Click the actions filter **[Show]** link to display **Search Filters**. The **Search Filter** is used when searching for specific items or for applying sort filters to change the display order of search results.

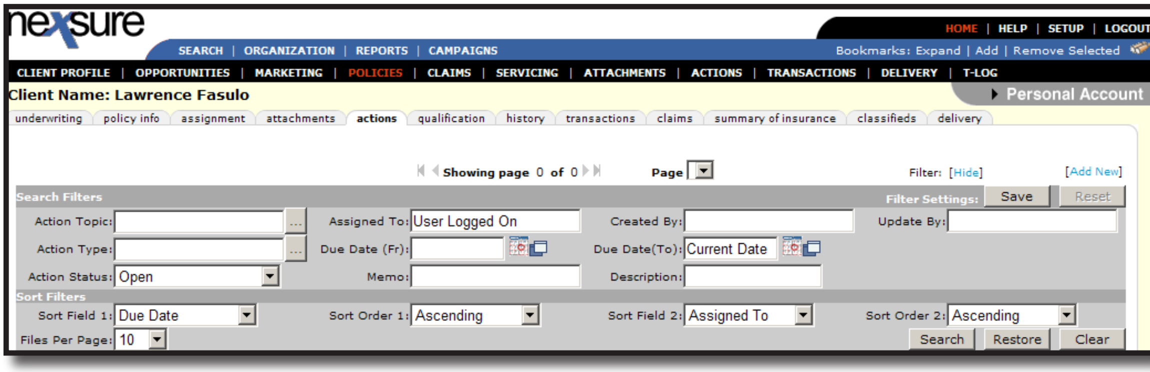
HOME > **ACTIONS**



Client menu > **ACTIONS**

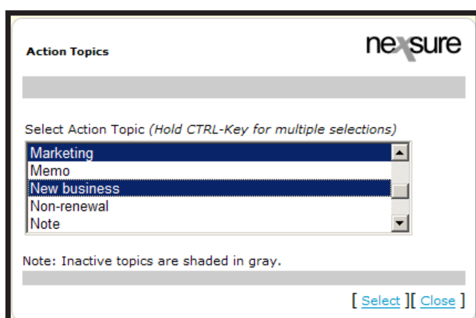


Policy > **actions**

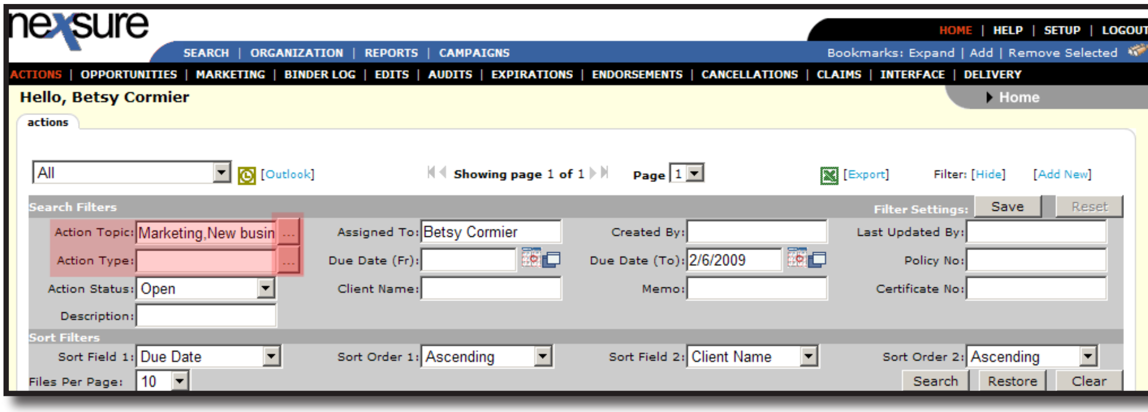


Enter information applicable to the Action being searched for. The more information entered in **Search Filter** criteria, the more refined the search results will be.

- When searching **HOME** > **ACTIONS** for an action that pertains to a client or policy, be sure to enter the client's name and/or policy number.
- An Action that is due in the future will display in search results only when the **Due Date (To)** includes the Action's future due date. An Open Action due 3/1/2009 will not display if the search filter **Due Date (To)** date is 2/25/2009.
- Use the **Action Topic** ellipsis to narrow search results to one or more defined **Action Topics**. To select multiple **Action Topics** for use in a search, click the ellipsis button to the right of the **Action Topic** search filter box. The **Action Topics** selection box pop-up displays. Hold the **Ctrl** key and select the **Action Topics** to be used as search criteria. Click the **[Select]** link to add the selections to the **Action Topic** search filter box.



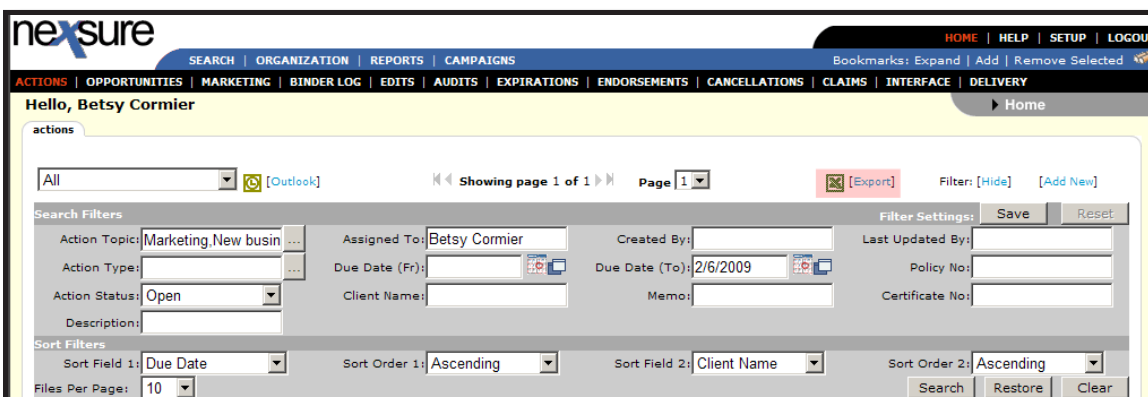
- The selected **Action Topics** are listed, separated by a comma, in the **Action Topic** search filter box.



- Use the **Action Type** ellipsis to select one or more **Action Types** for search filter criteria. The list of **Action Types** available to select is determined by the selected **Action Topics**. Leave this box blank to search for all **Action Types** associated with the selected **Action Topics**. Leave both **Action Types** and **Topics** search criteria blank to return results for all **Action Types** and **Topics**.

Click the **Search** button to return Actions that meet the current search filter criteria. If the search results returned are not correct, click the **Clear** button, change the search criteria and click the **Search** button to initiate a new search.

Search results from **HOME** > **ACTIONS** may be exported to Excel by clicking the **[Export]** link on the top of the screen to the left of the Filter **[Show]**/**[Hide]** link. Once the Action report is exported it may be saved or printed.

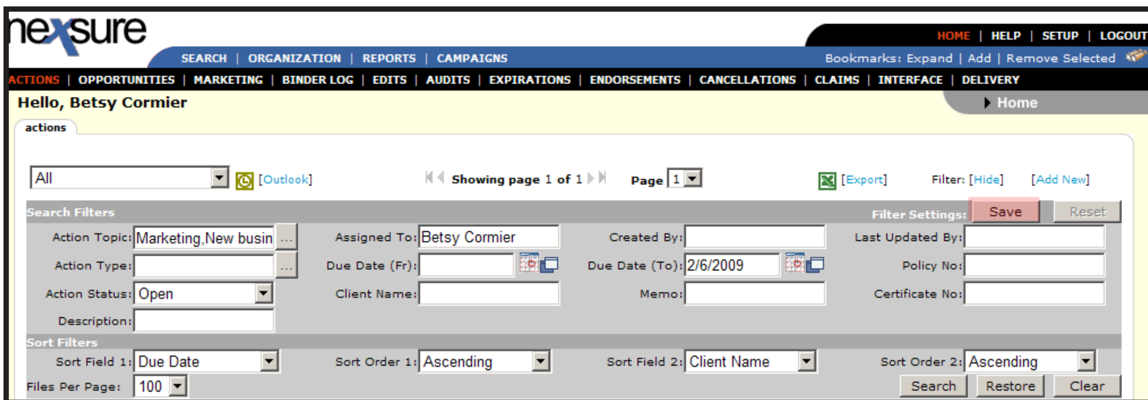


The current Search and Sort filter settings may be saved as a personal default view. For instructions on saving Search Filters, see "HOW to Customize Default Filter Settings for Actions".

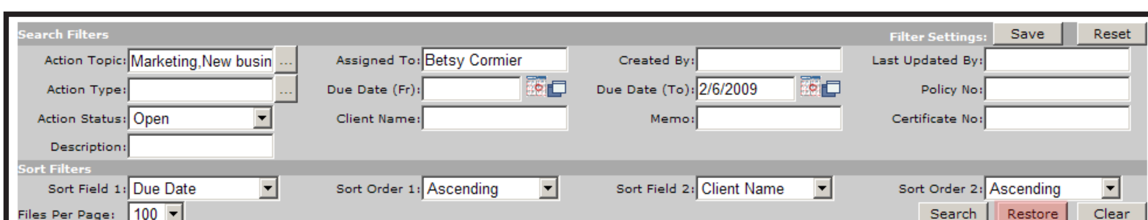
HOW to Customize Default Filter Settings for Actions

The summary view of Actions displayed at **HOME** > **ACTIONS**, **Client** menu > **ACTIONS** and policy actions can be customized by each user. Customizing default search filter settings is done separately at each level where actions are viewed, **HOME** > **ACTIONS**, **Client** menu > **ACTIONS** and policy actions. The steps to save a personal default view of Actions are the same at each level.

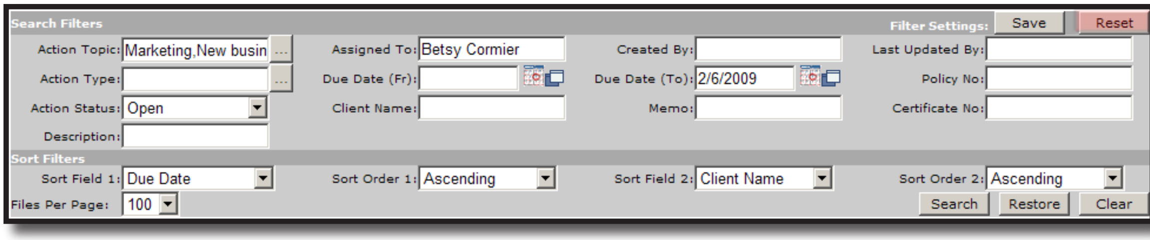
The user's currently displayed **Search** and **Sort** filter criteria may be saved as a personal default view of Actions by clicking the **Filter Settings Save** button. The next time Actions at that level is selected by the user, the items returned will be filtered by default to display Actions that meet the saved search criteria. Exercise caution when saving **Search** and **Sort** filter settings with a date range entered as returned Actions will be restricted to that date range. Use the **Date Variable** icon to enter a variable number of days to set a continuous date range as the search criteria. Enter **+** or **–** and the number of days up to three digits in the **Date Variable** pop-up to establish date criteria before (**-**) or after (**+**) the current date before clicking **Save**.



The user's saved filter settings will not be altered by subsequent searches for specific actions. The saved settings will remain as saved and will not be altered by those future searches. Clicking the **Restore** button located between **Search** and **Clear** will return the search filter criteria to the saved personal default settings. Use the **Restore** button if you want to view Actions by the saved default settings before leaving the screen.



When search filters are saved, the **Reset** button is activated. **Reset** is used to restore the default filter settings to the Nexsure default at that level. **Reset** removes any previously saved search filter criteria. The next time Actions at that level is selected by the user, the items returned will be filtered by the Nexsure default. Search filters that display an inactive **Reset** button do not have any saved filter settings.



Filter Settings Buttons	Description
Save	**Clicking Save stores the current search criteria as the user's personal default view of HOME > ACTIONS.**
Restore	**Clicking Restore returns the search results to the saved search criteria after performing a search using different search criteria.**
Reset	**Clicking Reset restores HOME > ACTIONS to the Nexsure Default and removes any saved search criteria.**

Notes