Chapter 6

Policy

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- * Adding a Thank You Letter
- * Editing the Policy
- * Adding, Editing and Removing Assignments
- Admitted Carrier Identification
- * Summary of Insurance

Accessing the Policy

There are several ways to access policies once they have been placed in force. Depending on the screen that is currently displayed or process currently taking place, use the following to help determine the quickest route.

- When tracking daily workflow, a policy may be accessed from a Home page. Clicking the Details icon of the policy displays the policy underwriting screen. Accessing the policies from these screens is generally done while processing daily workflow. An example of use: Policies have been received from the carrier and binders need to be closed. Click HOME > BINDER LOG to check for the open binder and access the policy to close the binder.
- Locate a client from the Search screen and click on the Details icon. Click the policy number link on the client card file below the sticky note or click POLICIES from the Client menu, then the Details ricon beside the policy to display the underwriting screen.

The **underwriting** screen displays with a blue policy header. The information on this screen and the **policy info** tab is locked down after in forcing a new or future renewal policy and can only be changed through servicing.

nevsure			HOME HELP SETUP LOGOUT
SEARCH ORGANIZATION REPORTS	CAMPAIGNS		Bookmarks: Expand Add Remove Selected 🛷
CLIENT PROFILE OPPORTUNITIES MARKETING POLICIES	CLAIMS SERVICING	ATTACHMENTS ACTIONS TRAN	SACTIONS DELIVERY T-LOG
Client Name: Lightship Telecom, Inc.			Commercial Account
underwriting policy info assignment attachments actions	qualification history	transactions claims summary of in	isurance classifieds delivery
Branch: Ace Insurance Branch	Policy Term:	12:01AM 03/09/2009 PST 03/09/2010 12:01AM	navigation instruction
Policy Type/Primary State: Monoline NH 💌	Coverage Term:	PST 12:01AM 03/09/2009 PST 04/08/2009 12:01AM	Base Requirements Auto - Commercial
Issuing Co: Hartford Casualty Insurance Billing Co: Hartford Insurance Group	Stage: Mode:	PST Policy New	
Policy Number: BA9148154761	Status:	Bound 🔲 Non-renewing	
Policy Description:	Origination Date:	03/09/2009	
List F	rint History	In Force Save Changes]

Note: The policy's **Status** on the **underwriting** tab's header displays as **Bound** for policies placed **In Force** from marketing when the options **Bound** and **Create Binder** are selected. For information on working with Binders, see "Binders", Chapter 8, in this Training Manual.

Policy Header Information	Definition
Branch	The policy's primary Branch assignment displays.
Policy Type/Primary State	The Policy Type displays as either Monoline or Package. A Monoline policy contains one line of business. A Package policy contains more than one line of business. The Primary State is the State/Province of the Client's primary location physical address unless a different State/Province is selected for this policy.
Issuing Co	The Issuing Co (Carrier) is the insurance company writing the policy.
Billing Co	The Billing Co is the company where payments are sent and received by the agency for this policy.
Policy Number	The Policy Number may be Unassigned or TBD until the policy is received. Enter the actual policy number when it is known through SERVICING > Edit. For information on editing the policy, see "Editing the Policy" later in this Chapter.
Policy Description	The optional Policy Description is used to categorize the policy. The Policy Description may be left blank.
Policy Term	The Policy Term dates are the effective and expiration dates of the policy. The Policy Term does not change throughout the life of the policy.
Coverage Term	The Coverage Term dates reflect the effective and expiration dates of coverage and change as policy coverage is changed through servicing. The Coverage Term expiration date of a Bound policy is the expiration date of the binder term.
Stage	Nexsure determines the Stage of a policy through the Servicing process. The Policy stage is displayed for in-force policies.
Mode	Nexsure determines the Mode of a policy if the mode is anything other than New or New on Existing. When creating a New policy, the mode may be changed to New on Existing and when renewing a policy with a mode of new, the selection of new, new on existing or renew may be selected. The modes of a policy are New, New on Existing, Renew, and Re-New-Co.
Status	Nexsure determines the status of In Force and Bound policies. The policy Status will change through the servicing process.
Origination Date	The Origination Date is the first Policy Term Effective Date. The Origination Date remains static throughout the life of the policy.

Understanding the Policy Summary Screen

After clicking the **POLICIES** link on the **Client** menu the policy summary screen is displayed. By default all active policies are displayed by expiration date in ascending order, showing only the policy header for the group. The default may be changed as needed. See "HOW to Use the POLICIES Summary Search Filter", in this chapter, for details on changing the default. The entire policy is grouped together until the policy is cancelled or sent to history. The dark blue policy represents the current version and the gray policy represents an older version. The coverage term dates are located on the single iteration of the policy and is seen only when the policy group is expanded. This date is important when determining what coverages were on the policy during a specific time frame.

Always	Show Acti	ve		M Showing	Page 1 of 2 🕨 🕅	1 💌	[Expand All] Filters: [Sho
Show/ Hide		Policy Number Policy Description	Policy Type Line of Business	Policy Term	Status Mode	Annualized Premium Estimated Premium	Billing Carrier Issuing Carrier
» 🖻	Ø	TR-987987987 Truckers	Monoline Truckers	08/12/2008 08/12/2009	In Force New	\$0.00 A \$0.00 A	AIG National Insurance Company AIG National Insurance Company
s Þ	Ø	CAuto-8765-2009 Commercial Auto	Monoline Auto - Commercial	05/01/2009 05/01/2010	Pending All	\$4,500.00 A \$4,500.00 A	AIG National Insurance Company AIG National Insurance Company
≥ 🕏	ø	Wind-7890890890 Windstorm - 140	Monoline Windstorm - Commercial	05/27/2009 05/27/2010	In Force New	\$500.00 A \$500.00 A	Auto-Owners Insurance Company Auto-Owners Insurance Company
» 🖓	ø	Boiler-8797897 Boiler and Machinery	Monoline Boiler and Machinery	05/27/2009 05/27/2010	Pending Cancellation New	\$0.00 A \$0.00 A	Auto-Owners Insurance Company Auto-Owners Insurance Company
≥ 🖻	ø	UMB-400000 Umbrella	Monoline Umbrella - Commercial	07/06/2009 07/06/2010	In Force New	\$0.00 A \$6,000.00 A	Auto-Owners Insurance Company Auto-Owners Insurance Company
¥ 🖗 🛙	1 🕫	WC-600000 Workers Compensation	Monoline Workers Compensation	07/06/2009 07/06/2010	Submitted New	\$3,000.00 A \$3,000.00 A	Auto-Owners Insurance Company Auto-Owners Insurance Company
» 🦻	ø	CPP-76000 Package Policy	Package	07/06/2009 07/06/2010	Renewed New	\$0.00 A \$7,500.00 A	Auto-Owners Insurance Company Auto-Owners Insurance Company
Package 1	Includes:	General Liability - Commerc	ial, Property - Commercial				
» 🖓	ø	Crime-80000 Crime Policy	Monoline Crime	07/06/2009 07/06/2010	In Force New	\$0.00 A \$7,500.00 A	AIG National Insurance Company AIG National Insurance Company
s	Ø	BR234000-1 Builders Risk	Monoline Installation/Builders Risk	08/04/2009 08/04/2010	Pending New	\$0.00 A \$0.00 A	AIG National Insurance Company AIG National Insurance Company
» 🖟	ø	AV-678000 Aviation Forms	Package	08/04/2009	In Force New	\$0.00 A \$0.00 A	Auto-Owners Insurance Company Auto-Owners Insurance Company

Screen Attributes and Behavior:

- The policy header is dynamic and displays updates made to the record such as Policy Description, Carrier, Policy Number etc.
- To see only the active policies, select the Always Show Active check box. Selecting this check box will expand all policy families to show all active policies (blue) including any pending activity (pixilated). The save filter setting (found by clicking the [Show] link) can be used to save the Show / Hide active filter so that users may choose to have their default setting show all active policies.
- Selecting the [Expand All] link will expand all policy families to show all policies in the family. Selecting [Collapse All] link will return to main policy header only view. The save filter setting (found by clicking the [Show] link) can be used to save the [Expand All] link so that users may choose to have as their default setting.

LIENT PRO	FILE C	OPPORTUNITIES I	MARKETING	POLICIES CLA	IMS SERVICING	ATTACHMENTS	ACTIONS TRANS	SACTIONS DELIVERY	-LOG		
ient Nai	me: Cab	ole One									Commercial Acc
olicies h	istory c	ertificates binder	s verificatio	ons summary of in	surance						
Alway	s Show Ac	tive				🕅 🖣 Showing Pa	ge 1 of 1 🕨 🕅	1 💌		[Expand	All] Filters: [Show]
Show/ Hide		Policy Numb Policy Descrip	er tion	Policy Typ Line of Busi	pe ness	Policy Term	Status Mode	Annualized Premium Estimated Premium	B	illing Carrier suing Carrier	
ی 😢	ø	UM-600000 Umbrella	1	Monoline Umbrella - Con	e 07/ nmercial 07/	/23/2008 /23/2009	Renewed New	\$0.00 A \$0.00 A	Auto-Owner Auto-Owner	s Insurance Company s Insurance Company	
		Stage	Status	Change	Coverage From	Coverage To	Action Descript	ion	Billed Premium	Updated By	Updated Date
	- Ø	Policy	Renewed		07/23/2008	07/23/2009	🖗 Process new ma	arketing application.	\$0.00	Mary Oberleitner	07/23/2009
» 🖻	ø	GL050000)	Monolin General Liability - (e 08/ Commercial 08/	/20/2008 /20/2009	In Force New	\$0.00 A \$0.00 A	<u>Auto-Owner</u> Auto-Owner	s Insurance Company s Insurance Company	
		Stage	Status	Change	Coverage From	Coverage To	Action Descript	ion	Billed Premium	Updated By	Updated Date
	- Ø	Policy	In Force		08/20/2008	08/20/2009	🖗 Process new ma	arketing application.	\$0.00	Mary Oberleitner	08/20/2009
ی 🛃	Ø	Tr-200000- Trucks	1	Monoline Auto - Comm	e 06, hercial 06,	/01/2009 /01/2010	Submitted New	\$0.00 A \$0.00 A	AIG Nationa AIG Nationa	l Insurance Company I Insurance Company	
Ħ		Stage	Status	Change	Coverage From	Coverage To	Action Descript	ion	Billed Premium	Updated By	Updated Date
P	۵ 🕼	Endorsement	Submitted	Endorsed	06/15/2009	06/01/2010	Process endorse Out of Sequence	ement. Endorsement	\$0.00	Mary Oberleitner	08/27/2009
	Ø	Policy	In Force		06/20/2009	06/01/2010	Add Driver OOSE: Add Ford	Utility Truck	\$0.00	Mary Oberleitner	07/22/2009
	≙ Ø	Endorsement	Submitted		06/20/2009	06/01/2010	Add Driver OOSE: Process e	ndorsement.	\$0.00	Mary Oberleitner	08/27/2009
ی 😵	ø	BA-900000- Business Auto I	09 Policy	Monoline Auto - Comm	e 06, nercial 06,	/01/2009 /01/2010	In Force New	\$0.00 A \$0.00 A	Auto-Owner Auto-Owner	s Insurance Company s Insurance Company	
Ħ		Stage	Status	Change	Coverage From	Coverage To	Action Descript	ion	Billed Premium	Updated By	Updated Date
	Ø	Policy	In Force		06/15/2009	06/01/2010	🔌 Add Driver Bren	da Johnson	\$0.00	Mary Oberleitner	07/22/2009
8 P	Ø	WC-00099 Work Com	9 P	Monoline Workers Compe	e 07, ensation 07,	/23/2009 /23/2010	In Force Renew	\$0.00 A \$0.00 A	Auto-Owner Auto-Owner	s Insurance Company s Insurance Company	
		Stage	Status	Change	Coverage From	Coverage To	Action Descript	ion	Billed Premium	Updated By	Updated Date
	G	Policy	In Force		08/06/2009	07/23/2010	Process endorse	ement.	\$0.00	Mary Oberleitner	10/02/2009

- Viewing Policies in the Group
 - □ Clicking the **Expand/Collapse**
 toggle button will expand all or collapse policy iterations.
 - The default expanded view sort is by coverage term effective date in ascending order and may not be changed in the show filters, but clicking the headers will re-order on the selected column. A white pointer will display the direction of the sort (ascending – pointing up and descending – pointing down). Only one column header may be sorted at a time. Selecting a different header will change the sort to the newly selected column. When the screen is refreshed by searching or navigating away, the order will return back to the default.
 - Policy group expand (+) and collapse (-)within the policy group, display a plus or minus sign that enables user to hide duplicate invalid policy iterations for the same coverage term.
 - □ Clicking the **Expand** button will expand policy family to display all policies.
 - By default, Expand + button will be displayed, meaning the policy iterations with the same coverage effective dates that are no longer viable policies (due to edits or out of sequence endorsements for example) will not be displayed. This is done to make it easier to locate and select the most updated version of the policy for the particular coverage term when reporting claims, answering questions, etc. The Expand/Collapse + button is a toggle button which can be selected again to return back to the prior selection. If no additional policies exist in the policy group, the Expand/Collapse + button won't be available for selection.

0) 🐶	ø	CPP-987867 Florist Pa	56-2009 ckage	Package	06/0 06/0	9/2009 9/2010	In Force New	\$3,000.00 A \$3,000.00 A	Auto-Owner Auto-Owner	s Insurance Company s Insurance Company	
P.	Package Includes: General Liability - Commercial, Property - Commercial											
	Ħ		Stage	Status	Change	Coverage From	Coverage To	Action Description		Billed Premium	Updated By	Updated Date
	2	¢2	Policy	In Force	Endorsed	06/09/2009	06/09/2010	🖗 Add policy number		\$0.00	Mary Oberleitner	06/09/2009
	2	ø	Policy	In Force		06/15/2009	06/09/2010	👂 Increase Building limit		\$0.00	Mary Oberleitner	06/09/2009

- Clicking the **Details** icon on the header will display the policy underwriting screen for the most current policy.
- Clicking the Assign icon will display the Assignment List dialog box with the list of people in the agency assigned to the policy.
- Clicking the **Retail Agent** icon will display the Retail Agent record and hovering over the icon will display the name of the Retail Agent.
- Moving the pointer over the Line of Business, Policy Number, Policy Description and Policy Type fields on the policy header will display the information in a larger font for ease of reading. Clicking those items in the summary view will open a display box containing the selected information.
- The **Status** is displayed on the policy header.
- The **Change** field is a field also found in history and denotes the action that was taken to finalize this iteration of the policy.
- The **Stage** is defined by Nexsure and is located on the single iteration of the policy.
- The Mode (New, New on Existing, Renew and Re-New-Co) and will display what mode the policy is currently in.
- The Annualized \$ and Estimated Premium amounts from the policy info screen display are found on the policy header. (A = agency bill; D = direct bill)
- The Billed Premium populates from the posted invoice and is located on the single iteration of the policy.
- The Policy Term will display the effective and expiration dates of the policy and is located on the policy header.
- The Coverage Term will display the effective date of endorsements and/or expiration dates of cancellations and is located on the single iteration of the policy. This term indicates the term coverages on the policy are valid.
- The Issuing Carrier displayed is the carrier writing the coverage and Billing Carrier displayed is the carrier who is billing the policy and is located on the policy header.
- The **Updated By** and **Updated Date** displays the person who updated the marketing quote along with the date it was updated and is located on the single iteration of the policy.

- Context Tools are accessed by right clicking on the Details right icon.
 - Active (blue and pixilated policies) display active policy context tool menu (options include open, add new opportunity, market existing, market new line of business, print, service and summary of insurance).
 - History policies on policy screen (displayed in gray) display history policy context tool (options include open, add new opportunity, market existing, market new line of business, print, rewrite and service).

Note: The **Remove** icons are no longer available since policies were actually just placed into history and not deleted. Due to the policy grouping concept, the entire group will be sent to history and this can now only be done by using the **History** link on the **underwriting** tab's **Navigation Toolbar** or by posting a cancellation. In addition, the **Delete** icon served no purpose on the history screen and has been removed.

Identifying Serviced Polices

- Pending /submitted endorsements, audits and edits:
 - Policy header displays in blue pixilated background until policy service posted or aborted.
 - **u** Single policy iteration displays in blue pixilated background under the policy header.
- Pending cancellations:
 - Policy header displays with red text until the cancellation posted or aborted.
 - □ Single policy iteration with a pending cancellation displays red text.
- Pending claim(s):
 - □ Policy header is outlined in red until the claim is posted or aborted.
 - □ Single policy iteration is outlined in red.
- Policy flagged for nonrenewal:
 - □ Issuing Carrier name on policy header has red strike through it.
- Renewed policy:
 - Policy header displays with a green **Details** icon until the policy group is placed in history.
 - □ Single policy iteration displays with a green **Details** icon until the policy group is placed in history.
- Policy Expiration Date Passed (Expired):
 - Policy header displays with a red **Details** icon until the status is changed by servicing the policy or moving it to history.

- Single policy iteration displays with a red **Details** icon until the status changed by servicing the policy or moving to history.
- Selecting the **Details** icon of a policy when the expiration date has past but the status has not changed to expired will prompt the user to change the **Status** to **Expired**.

Ехр	irati	ion Date Pass	ed (Expired)			ANSACIJUNS DELIVERY 1-LUG	Commercial Account
		Ne		K ≤ Showing Pa	age 1 of 2 🕨 🕅	1 💌	[Expand All] Filters: [Show]
Show / Hid		Policy Number Policy Description	Policy Type Line of Business	Policy Term	Status Mode	Annualized Premium Estimated Premium	Billing Carrier Issuing Carrier
⊗ 🖻	ø	TR-987987987 Truckers	Monoline Truckers	08/12/2008 08/12/2009	In Force New	\$0.00 A \$0.00 A	Non Renewal Pending
ی	Ø	CAuto-8765-2009 Commercial Auto	Pending End	lorsement	ending All	\$4,500.00 A \$4,500.00 A	AIG National Insurance Company AIG National Insurance Company
⊗ ₽	ø	Wind-7890890890 Windstorm - 140	Monoline Windstorm - Commercial	05/27/2009 05/27/2010	In Force New	\$500.00 A \$500.00 A	Auto-Owners Insurance Company
⊗ 🖓	ø	Boiler-8797897 Boiler and Machinery	Monoline Boiler and Machinery	05/27/2009 05/27/2010	Pending Cancellation New	Pending Car	ncellation ne Company
Poli	cy R	Renewed	Monoline Umbrella - Commercial	07/06/2009 07/06/2010	In Force New	\$0.00 A \$6,000.00 A	Auto-Owners Insurance Company Auto-Owners Insurance Company
¥ 🕨 🛙	Ø	WC-600000 Workers Compensation	Monoline Workers Compensation	07/06/2009 07/06/2010	Submitted New	\$3,000.00 A \$3,000.00 A	Auto-Owners Insurance Company Auto-Owners Insurance Company
* •	ø	CPP-76000 Package Policy	Package	07/06/2009 07/06/2010	Renewed New	\$0.00 A \$7,500.00 A	Auto-Owners Insurance Company Auto-Owners Insurance Company
Package In	icludes:	General Liability - Commer	cial, Property - Commercial				
Pen	din	g Claim	Monoline Crime	07/06/2009 07/06/2010	In Force New	\$0.00 A \$7,500.00 A	AIG National Insurance Company AIG National Insurance Company
ی 🕼	Ø	BR234000-1 Builders Risk	Monoline Installation/Builders Risk	08/04/2009 08/04/2010	Pending New	\$0.00 A \$0.00 A	AIG National Insurance Company AIG National Insurance Company
ی 😵	ø	AV-678000 Aviation Forms	Package	08/04/2009 08/04/2010	In Force New	Standard Activ	re Policy
Package In Pollution/En	ncludes:	Aircraft - Commercial, Aircr ental Liability, Product Tamp	aft - Glider, Aircraft - Industrial Aid bering, Property - Commercial	, Aircraft - Non-Owned,	Aircraft - Pleasure	& Business, Airport & Fixed Base Ope	rator, Excess Liability, Political Risk/Credit,

• Active current policy displays with blue background.

HOW to Use the POLICIES Summary Search Filter

The **POLICIES** link on the **Client** menu will populate based on the default filter settings. The search filter is used when searching for specific policies or for applying sort filters to change the display order of search results. Click the filter's **[Show]** link to display the search filters. Enter specific **Search** and **Sort Filter** criteria and click the **Search** button to display policies that meet the current search criteria.

Note: Security rights may change the default filter to restrict policies displayed on the policy summary to one or more **Business Types**. **Business Types** are Benefits, Bonds, Commercial Lines, Financial Services and Personal Lines. If allowed, Users may override the **Business Types** restriction by clearing the filter's **Business Types** criteria to search for all policies. Click the **Business Type(s) Ellipsis** ... button to select and search for policies by one or more specific **Business Types**.

The current **Search** and **Sort Filter** settings may be saved as a personal default view of **Client** menu > **POLICIES** by clicking the **Filter Settings Save** button. The next time **Client** menu > **POLICIES** is selected by the user, the items returned will be filtered by default to display policies that meet the saved search criteria. Exercise caution when saving **Search** and **Sort Filter** settings with a date range entered as returned items will be restricted to that date range. Clear any date search criteria before clicking **Save**.

ent Name: licies histor	ry certificates	binders	verifications	summary of insurance				► Comm	ercial Accoun
					K 4 Showing Pag	e 1 of 2 🕨 🕅	1 💌	[Show Active] [Expand All] Filte	ers: [Hide]
								Save Filter Settings Save	Reset
Policy N	Number:			Term Eff. Date (Fr):		Term Eff. Date (To	»):	Assignment:	
	Mode: All		~	Term Exp. Date (Fr):		Term Exp. Date (To	»):	Responsibility:	
Policy	Status: All		~	Cvg. Eff. Date (Fr):		Cvg. Eff. Date (To	»): 6	Updated By:	
Issuing (Carrier:			Cvg. Exp. Date (Fr):		Cvg. Exp. Date (To	»):	LOB:	
Billing	Carrier:			Updated Date (Fr):		Updated Date (To	»):	Bill Method: All	~
Retail	l Agent:			Action Description:		Business Type(s	;):		
Sort I	Field 1: Exp Da	te	~	Sort Order 1: As	cending 💌	Sort Field	2:	Sort Order 2: 💌	
Files Per	er Page: 10 🔽							Search Restore	Clear
Show/	Polic	y Number	_	Policy Type	Policy	Status Annuali	zed Premium	Billing Carrier	

The user's saved filter settings will not be altered by subsequent searches for specific policies. 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 **Client** menu > **POLICIES** 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. **Reset** removes any previously saved search filter criteria. The next time **Client** menu > **POLICIES** 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	Description
Save	Clicking Save stores the current search criteria as the user's personal default view of Client menu > POLICIES.
Restore	Clicking Restore returns the search results to the saved search criteria after performing a search using different search criteria
Reset	Clicking Reset restores Client menu > POLICIES to the Nexsure Default and removes any saved search criteria

Note: Search results will be returned by displaying the policy header for any policy headers that have matching criteria to the search performed. The **Files Per Page** setting in the show filters will display that number of policy headers (Example: Selecting 10 files per page will return 10 policy headers).

Adding a Thank You Letter

The attachment option allows you to attach photographs, documents, e-mail, etc to a client or to a client's policy. Documents, such as a thank you letter, can be created and attached using user defined templates.

WHY a User Defined Template?

User defined templates are created in **SETUP** under the **Document Templates** link on the **Setup Console**. These are created to save time at client level. Documents created in setup are saved globally and can be used on any client in Nexsure. User defined templates can be added to include merge fields that will populate from the client and/or policy information into the document at the time the template is merged at client/ policy level. After the template has completed the merge process it can then be edited if necessary.

Note: See the Nexsure point person in your agency to add document templates.

HOW to Utilize a User Defined Template

There are two levels of attachments, the Client level and the Policy level. An attachment created at the Client level is used to attach general information pertaining to the client. An attachment created at the Policy level applies to the selected policy.

- Locate the appropriate client through SEARCH and click the POLICIES link on the Client menu. All in force policies for the client are displayed in a summary view.
- Click the **Details** icon of the policy.
- Click the **attachments** tab.
- Attachments done at the policy level are displayed.

Note: The defaults configured in the **[Show]** filters option will determine what is displayed in the summary view when clicking the attachment tab.

 Click the [Add New] link. There are 2 [Add New] links, one on either side of the attachments summary.

nexsure		HOME HELP SETUP LOGOUT
SEARCH ORGANIZATION REPO	RTS	Bookmarks: Expand Add Remove Selected
CLIENT PROFILE OPPORTUNITIES MARKETING POLIC	ES CLAIMS SERVICING ATTACHMENTS ACTIC	DNS TRANSACTIONS DELIVERY T-LOG
Client Name: Jane Cooke		Personal Account
underwriting policy info assignment attachments acti	ons qualifications history transactions claims	summary of insurance classifieds
[Add New]	Showing Page 0 of 0	[DMS] Filters: [Show] [Hide] [Add New]
Details Attachment Name LOB/Policy Cert #/Re	# Category Description Doc Type	Created By Date Created Remove Updated By
classifieds 人 summary of inst	rance $igstyle $ claims $igstyle $ transactions $igstyle $ history $igstyle $ qualifications	: $igstarrow$ actions $igstarrow$ attachments $igstarrow$ assignment $igstarrow$ policy info $igstarrow$ underwriting

- The Nexsure Office Integration Add New Attachment pop-up window is displayed.
- Click the **Create Document with Template** option.
- Enter the **Attachment Name**, **Document Description** and click the **Next** button.

Nexsure Office Integration	ne sure
Add New Attachment	
 Add Attachment Create Document with Template Create Document without Template Attach Outlook Messages Add External Attachment 	e
Attachment Name: Thank You Document Description: Thank You Cancel	Next >>

- The Nexsure Office Integration New Document pop-up window is displayed.
- Enter the word "thank" into the Template Name field.
- Enter the description and select the Document Type, Category and Business Type from the dropdown boxes.
- If the Template Name, Description, Document Type, Category and Business Type are not known, leave the fields blank and click Search. This will display all document templates that have been created.

Note: Entering at least one search field will narrow down the search results.

- Templates falling within the search criteria entered are displayed in the Available Templates box.
- Click on the appropriate template to highlight it and click the **Next** button.

Nexsure Office Integratio	n	ne sure	;
New Document			
Template Name: Template Description: Document Type: Category: Business Type:	thank MS Word All All	V V Search	
Available Templates:	Thank You		
L		Cancel Next >>	

- The Policy section is displayed. Select the criteria to default into the document from the dropdown boxes:
 - Named Insured
 - Contact
 - Location
 - □ Assignment
 - □ Lines of Business (available only if the document will be incorporating application information).
- Click the **OK** button. Click **Back** to page back or **Cancel** to abort.
- The document will be opened in Microsoft Word or Excel (whichever was specified) and will
 integrate with client and policy information.
- After the integration process is complete, edit the document as necessary using Microsoft Word or Excel functions. Click the Nexsure Fields button to display the XML Tree for access to information in the client record. Expand the XML Tree. Selected field information dragged from the XML Tree into the document displays at the cursor's position in the document. Click the

Nexsure Fields button to close the XML Tree.

📭) 🖬 🤊 - ೮ 🋱 🛕 💝 🗋 🐸 🤮 💷 - 🛃 🗐 🕂 📋	🖓 - 💷 🗧 Thank You [Compatibility Mode]
Home Insert Page Layout References Mailings	Review View Developer Add-Ins Acrobat
Home Insert Page Layout References Mailings OmniPage Pressure Fields Nexsure Save RepeatBegin Menu Commands Custo September 15, 2008 Betsy Commier 12 David Dr Hudson, NH 03051 Dear Betsy: We menuld like to take this emperturbitive theole use for sume	Review View Developer Add-Ins Acrobat RepeatEnd HideEnd Validate Paste About XML Tree Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: Client Image: C
full service agency, we would like the opportunity to assist yo that might arise.	
Our team is available should you need any assistance. Please e any concerns or if we can help you further.	BranchName BranchWebSiteURL BranchAddress1
Sincerely,	
Producer Cormier	BranchCity BranchState BranchState BranchZip D BranchZip D BranchZip
	BranchFaxNo

- When the document has been completed, click the Nexsure Save like button.
- The Save Nexsure Document dialog box is displayed.



- Select **Draft** to save the document as incomplete and allow future editing of the document.
- Select **Complete** to prevent future alteration or editing of the saved document.
- Select Save and Return to Document to save and continue editing the document. The Save Nexsure Document dialog box closes.
- Select Save As to save a copy of the document to local or network folder outside of Nexsure.
- Click the OK button to save the document per the selected Draft, Complete, or Save and Return to Document option. Clicking the Back button will cancel the save and return to the document. Clicking Cancel will abort a new document or abort changes to a previously saved draft document.
- The Attachment summary view is displayed. Documents saved as a Draft display on the attachment summary with a Status of Draft.
- Click the attachment Details icon to open a completed document for viewing or a draft document for editing. Follow the previous steps for saving a draft document. Click File > Close a completed document after viewing.



Click the Word *IV* icon to change the attachment name or document description. Click OK to save or Cancel to close the pop-up window.

Note: To close document templates after creation or editing, always click the Nexsure Save

button to display the **Save Nexsure document** dialog box. A completed document opened for viewing may be closed using the Word **File** menu.

Editing the Policy

Once a quote is bound or in forced, the information contained in the header and application is locked down. An Edit is used to make internal changes or corrections to the bound or in force policy. Edits do not generate a policy change request form, as they would not need to be sent to the carrier or client.

Note: Only one Edit may be pending for a policy at a time.

HOW to Process an Edit

A typical edit may include corrections to typing errors, adding the policy number, etc.

- Locate the appropriate client through **SEARCH** and click the **SERVICING** link on the **Client** menu.
- Select the Edit option.
- The effective date will default to today's date. Edits do not require an effective date so leave this field as is.
- The Description and Memo fields on the Servicing screen will default to Process edit. To replace text, highlight and type text into the Description field or append text. When tabbing from the Description field the Memo field defaults to what was entered in the Description field. The text may be changed or appended to in this field as necessary. The Description field can hold up to 95 characters and the Memo field is not limited to this small amount and is intended to be used to fully describe what is being done. While both of these fields are used to create the action, it is the Description field that can be seen on the policy summary screen, so make sure to enter a short descriptive message that will supply at a quick glance what was done.

nexsure								HOME HELP	SETUP SUPPORT LOGOU		
SEARCH ORGANIZATION REPORTS CAMPAIGNS ELINKS Bookmarks: Expand											
CLIENT PROFILE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRANSACTIONS DELIVERY T-LOG											
Client Name: Nunnally's Gla	ass & Framin	g Inc.							Commercial Account		
servicing											
Services											
Marketing	This option is	is option is used to make changes or corrections that do not require a change request.									
Market Analysis	1	Enter the effective date of the edit: 08/24/2009									
Binders		Enter a brief description of the edit: Process edit.									
Edit		Enter additional notes to popu	late the action mem	o section: Droc	This information will populat	e the action description	n field.	~			
Endorsement				FIOC	riocess euro						
Renewal				N. Pag	ge1of1 ▷)				Filters: [Show]		
Cancellation	Select policy to	o edit:									
Claim	Select	Line Of Business Policy Number	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billed \$	Policy Term	Coverage Term	Issuing Carrier Billing Carrier		
Audit	0	Auto - Commercia CAuto-8765-2009	Policy In Force	New	Mary Oberleitner 07/30/2009	\$4,500.00 \$0.00	05/01/2009 05/01/2010	05/01/2009 05/01/2010	AIG National Insu AIG National Insu		
New Certificate(s)			Commercial Auto								
Renewal Certificate(s)											
Verification(s)											

• All in force policies for the client are displayed in a summary view.

- Select the policy to be edited and click the Generate Edit button.
- If any changes have been made to the units at risk associated to selected forms and have not been updated on the forms, the affected units at risk are presented. These should be selected to ensure that the selected policy record will be updated with the changes and in sync with the units at risk. After selecting, click Update Selected to add changes to the record. If none are selected the Skip will be active. Clicking Skip will not update the forms with the changes made to the units at risk associated to the form.

CLIENT PROFILE OPPORTUNITIE	S MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRANSACTIONS DELIVERY T-LOG									
Client Name: Nunnally's Gla	ass & Framing Inc.									
	,									
servicing										
Services	Services Edit suscentially generated									
Marketing	Eait successfully generated.									
	The following units have been updated, added or deleted and have not been changed on this policy. Please select the desired changes to por									
Market Analysis	Binders V Select all									
Binders										
<u>Edit</u>	Driver									
Endorsement	UTIVETS									
	<u>Name DOB Status DL#</u>									
Kenewal	▼ C Janet Kingston 04/12/1965 Included 4567897987									
Cancellation	Vehicles									
Claim										
A	Year Make Model VIN									
Audit	✓ C 2010 Volvo SR30 8979HG8797GH87897									
New Certificate(s)										
Renewal Contificato(c)	Locations									
<u>Reliewal Certificate(5)</u>	<u>Name Street City St Zip</u>									
Verification(s)	C 929 S Noble Street 929 S Noble Street Anniston AL 36201									
	_									
	Note: A (Add); C (Change); D (Delete)									

• The policy header is displayed with a light blue diamond background.

Note: An action with a closed status is created through the Servicing process. Nexsure tracks the pending edit for you, but if a personal follow up for the edit is need, the status of the action can be changed to open.

- The Stage displays Edit and the Status displays Pending in the header, Nexsure determines both.
- Add the policy number in the **Policy Number** field in the header.
- Click the **Save Changes** link in the navigation toolbar under the header.
- The edit can be left in a **pending** status if other corrections need to be made but the information is not readily available.
- See the **HOW to Post or Abort a Pending Edit** section.

Note: No other servicing functions can be added to the policy until the pending edit is either posted or aborted.

Adding, Editing and Removing Assignments

Assignments may be added, modified or removed without editing the policy. However, if other commission



defaults are to be applied to the policy info tab, the policy must have a pending or future status. Assignments added on the client **assignments** tab are automatically included on the marketing **assignment** tab. If the assignments need to be updated, removed or new ones added, click the **assignment** tab on the policy detail record.

To add a new assignment, click the **[add assignment]** link. The **Assign Account Management** window will display. Select the following from the drop-down boxes:

Assign Account Management	Definition
Branch	Select the appropriate branch. The branch on the assignment identified as the primary will be the branch that populates the form. If the primary branch is changed after the Policy record is created, make sure to update the form with the correct branch information.
Department	Select a department from the drop-down box. Departments are added by the System Administrator in Setup and only available departments for the selected branch are available.
Unit	Select a unit pertaining to the Department, if applicable. Units are not required. Units are added by the System Administrator in Setup and only available if added to the selected department in setup.
Responsibility	Select the appropriate responsibility. The responsibility defines the role for the selected name for this record. The Responsibilities appearing in the drop-down box are added by the System Administrator in Setup, Lookup Management.
Name	Select the name of the person responsible for this Client. The Names appearing in the drop-down box are Employees that have been added at Branch level in Setup by the System Administrator.
Primary	Check this box to set this Assignment as the primary responsibility for the account. The branch on the assignment identified as the primary will be the branch that populates the form. If the primary branch is changed after the Policy record is added, make sure to update the form with the correct branch information.
Save Button	Click the Save button to save the changes.
Cancel Button	Click the Cancel button to abort the change.

The first assignment entered, when adding a new entity, is designated as the primary assignment and is identified by a check mark in the **Primary** check box on the **assignment** tab. A primary assignment cannot be deleted; to change or delete a primary assignment another assignment will need to be designated as primary. This is done on the **assignment** tab by clicking the details icon of the assignment that should be designated as primary. Place a check in the **Primary** check box to designate the new primary assignment for this record and click the **Save** button. In the **assignment** tab summary view the newly appointed primary assignment will be displayed with a check mark in the **Primary** check box. The old primary assignment will now be displayed with an active check box in the **Remove** column on the right side of the record.

To remove selected assignment(s), click in the check box in the **Remove** column and to remove all except for the primary, place a check in the box to the right of the **Remove** heading label and click the **[remove** selected] link.

		SE	ARCH	ORGANIZATION RE	PORTS CAMP	PAIGNS ELI	NKS		Bo	okmarks: Expa	
CLIENT PROFILE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRANSACTIONS DELIVER											
lient Name: Oxford Band Instruments											
underwriting	policy	info assi	gnment	attachments actio	ons qualificati	ion history	transactions	claims summar	y of insuranc	e classifieds	
Branch: Southern Insurance						Policy Term:	(8/05/2010 12: 8/05/2011 12:	01AM 01AM		
Policy Type/PrimaryState: Monoline / AL					Coverage Te	rm: (8/05/2010 12: 8/05/2011 12:	01AM 01AM			
Issuing Co:	Issuing Co: Hartford				Stage:			Edit			
Billing Co:			Hartford	l	Mode:			lenew			
Policy Numb	er:		GL-8798	7987	Status:			Pending			
Policy Descri	iption	:	General	Liability policy	Origination Date: 08/05/2005						
	List			Print	Hist	ory	In Fo	Force Save Changes			
Viewable by I	Portal	User: 🗹	Client [🗹 Retail Agent 🗹 (Carrier	[remove selected] [add retail ag	ent][add	assignment]	
Details Prin	nary	Bran	ch	Department	Responsibility	Unit	Name	Ву	Updated	Remove 🗹	
P	2	Southern Ir	nsurance	1-AB1/DB1-PP1-CF	Producer	Unassigned	Mary Oberleitner	Admin Nexsure	8/7/2007		
P		Marys B	ranch	1-AB1/DB1-PP1-CF	Producer	Unassigned	Ron Nelson	Mary Oberleitne	r 8/7/2007	~	
Restrict p	policy	file access	to assigi	ned users only?							

On the popup window remove the check from the box beside Update Other Commissions on Policy Info if it is desired to modify the information on the **policy info** tab and then click the **OK** button to complete the removal or **Cancel** to abort.

Do you wish to delete this policy assignment(s)?	ne sure
Update "Other Commissions" in Policy Info	
	OK Cancel

Attachments Tab

For instructions on adding attachments see the CRM training manual Chapter 17.

Classified Tab

Classified can be used to classify marketing records. **Class Codes** and **Designations** are added by the System Administrator in Lookup Management found in **SETUP**.

Note: Entering information on the **classified** tab is not required.

The **classified** tab displays all code classes, descriptions and designations added for this marketing record in a summary view. To add classified information, click the **[add new]** link on the **classified** tab.



underwriting	policy info assignment	attachments	actions	qualification	history	transactions	claims	summary of insurance	classifieds	delivery		
Classified	lassified Summary [Add New]											
Details	Code Class		Code Description				Designation	Туре	Remove			
	No Current Records Found.											

From the **Code Description** drop-down box, make a selection. From the **Code Designation** drop-down box select the appropriate corresponding designation and click the **[Save]** link. Clicking the **[Cancel]** link will abort the process.

underwriting policy info	assignment attachments actions	qualificat	ion history	transacti	ons claims	summary	ofinsurance	classifieds d	elivery	
Policy Level Code Cla			[Cancel] [S	ave]						
Code Description:	-Select Code-	~	Code C	lass:						
Code Designation:	-Select Code- Assigned Risk High Home Values									
Note - Additional Class	Issue State Los Angeles Airport Service Center Policy	gh Setup under Lookup Management.								
delive	Solicit Auto Special Code	ms	transactions	history	qualification	actions	attachments	assignment	policy info	underwriting

To change the codes, click the **Details** icon on the summary screen.

underwriting	g policy info assignment attac	nments actions qualification history transactions	claims summary of insurance classifieds	delivery							
Classified Summary [Add											
Details	Code Class	Code Description	Designation	Type	Remove						
	ASR	Assigned Risk	CA ARP	P	E						
	delivery classifieds summary of insurance claims transactions history qualification actions attachments assignment policy info underwriting										

Reselect the codes and click the [Update] link.

underwriting policy info	assignment attachments	ctions Y qualification Y history Y transactions Y claims Y summary of insurance Y classifieds Y delivery								
Policy Level Code Classes & Designations [Cancel] [Delete] [Update]										
Code Description:	Los Angeles Airport	Code Class: LAX								
Code Designation:	-Select Code- Assigned Risk High Home Values									
Note - Additional Class	Issue State Los Angeles Airport	gh Setup under Lookup Management.								
	Service Center Policy Solicit Auto Special Code	Date Updated: 5/26/2011 1:04:44 PM MST								
deliv	ery <mark> classifieds</mark> summary of in	urance $igl angle$ claims $igl angle$ transactions $igr angle$ history $igr angle$ qualification $igr angle$ actions $igr angle$ attachments $igr angle$ assignment $igr angle$ policy info $igr angle$ underwriting								

To remove, click the **Remove** icon on the **classified** tab summary view and confirm removal by clicking the **OK** button on the confirmation popup.

ne sure	HOME HELP SETUP LOGOUT											
SEARCH ORGANIZATION REPO	Bookmarks: Expand Add Remove Selected 👹											
CLIENT PROFILE OPPORTUNITIES MARKETING POLICIES CLAIMS SERVICING ATTACHMENTS ACTIONS TRANSACTIONS DELIVERY T-LOG												
Client Name: Oxford Band Instruments Personal Account												
underwriting policy info assignment attachments actions qualification history transactions claims summary of insurance classifieds delivery												
Classified Summary	Windows Internet Explorer			[Add New]								
Details Code Class	Are you sure you want to delete this record?	Designation	Туре	Remove								
ASR ASR	м. Г	CA ARP	P	B								
delivery classifieds summary of insurance	OK Cancel	tions & attachments & assignm	ent / policy info	underwriting								

HOW to Track Pending Edits from the Home Menu

The **HOME** > **EDITS** link serves as a way to keep track of policies with a pending edit. 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. To track pending edits, click the **EDITS** link on the **Home** menu. The **Home** menu is the third menu down.

Note: When the edit is either posted or aborted, it will no longer appear on the **HOME** > **EDITS** link.

ne	sure							IOME HELP SETUP LOGOUT		
		SEARCH ORGAN	IZATION REPORTS (AMPAIGNS			Bookmarks: Expar	nd Add Remove Selected 🚿		
ACTIONS OPPORTUNITIES MARKETING BINDER LOG EDITS AUDITS EXPIRATIONS ENDORSEMENTS CANCELLATIONS INTERFACE DELIVERY										
Hello, B	etsy Cor	mier						▶ Home		
edits								4		
All				Showing Pag	ge 1 of 1 🕨 🕅	1 -		Filters: [Show]		
Details	Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Billing Carrier Issuing Carrier		
Þ		Lightship Telecom, I	(Commercial Lines)							
*	2	Unassigned	Monoline Auto - Commercial (I	Edit Pending	Betsy Cormier 02/10/2009	\$0.00 D \$0.00 D	03/09/2009 03/09/2010	Hartford Insurance G Hartford Casualty In:		
	ø	Process edit to enter	assigned Policy Numbe	r						

- Clicking the EDITS link will display all pending edits that fall within the search filter criteria for the Agency.
- If the edit is not displayed, click the [Show] filter, change the Search criteria and click the Search button to initiate a new search.
- Edits displayed on the **Home Edits** screen will have two **Details** icons.
 - □ Clicking the first **Details** *icon* will display the card file for the client.
 - Clicking the second **Details** icon will display the **underwriting** tab for the pending edit.

HOW to Track Pending Edits from the Client Menu

- Access the appropriate entity through **SEARCH.**
- Click the **POLICIES** link on the **Client** menu, all in force policies for the client are displayed in a summary view. The pending edit is displayed beneath the policy to which it applies in the expanded view. The pending edit will have its own **Details** icon.

CHAPTER 6

*	CAuto-8765-2009 Commercial Auto		CAuto-8765-2009 Monoline 05/01/2009 Pe Commercial Auto Auto - Commercial 05/01/2010		Pending All	\$4,500.00 A \$4,500.00 A	AIG National Insurance Company AIG National Insurance Company					
	Ħ		Stage	Status	Change	Coverage From	Coverage To	Action Description		Billed Premium	Updated By	Updated Date
	>	ø	Policy	In Force		05/01/2009	05/01/2010	🥬 Process edit.		\$0.00	Mary Oberleitner	07/30/2009
	Þ	Ø.	Edit	Pending		05/01/2009	05/01/2010	🥬 Process edit.		\$0.00	Mary Oberleitner	10/01/2009

In the collapsed view the background is the same as the actual edit to make it easy to see that there is a change in process on the policy.

	Jaio									HOME HEEP SET	
_		SEARCH	ORGANIZATION	REPORTS CAMI	PAIGNS ELINK	s			Во	okmarks: Expand Ado	d Remove Selected
IENT PR	OFILE OP	PORTUNITIES	MARKETING	OLICIES CLAI	MS SERVICIN	G ATTACHMENTS	ACTIONS TRANSACT	IONS DELIVERY T-LO	G		
ent Na	me: Nunr	ally's Glass	& Framing In	с.						•	Commercial Accou
icies	history ce	tificates bind	lers verifications	summary of ins	urance						
Alwa	ys Show Acti	/e				II I Showing Pa	ge 1 of 1 🕨 🕅	1 🗸		[Expan	d All] Filters: [Show
Show/ Hide	Policy Number Policy Description		Policy Type Line of Business		Policy Term	Status Mode	Annualized Premium Estimated Premium	H Is	Billing Carrier Souing Carrier		
8 🖻	Ø	CAuto-8765-2009 Commercial Auto		Monoline C Auto - Commercial C		05/01/2009 05/01/2010	Pending All	\$4,500.00 A \$4,500.00 A	AIG National Insurance Company AIG National Insurance Company		
Ħ		Stage	Status	Change	Coverage Fr	om Coverage To	Action Description	n	Billed Premium	Updated By	Updated Date
<u> </u>	* Ø	Policy	In Force		05/01/200	9 05/01/2010	🤌 Process edit.		\$0.00	Mary Oberleitner	07/30/2009
					05/04/200	0 05/04/0040	Recorder adit		¢0.00	Mana Obselations	10/01/2000

Clicking the **Details** icon of the pending edit from the version in the expanded view or the collapsed view displays the **underwriting** tab for the pending edit.

If no policy records display on the **policies** tab, a dialog box displays giving the following options:

- OK: Check for policies on the history tab.
- **Re-Set**: Modify the search filter criteria on the current **policies** tab.
- Cancel: Open the marketing tab.

🕘 Web Page Dialog	\mathbf{X}
Filter result found no record(s). Would you like to see if any history exists?	
[OK] Check for policy history.	
[Re-Set] Modify Search Criteria and Try Again.	
[Cancel] Ignore and go to marketing.	
OK Re-Set Cancel	

HOW to Use the Edit Summary Screen

Only one edit may be pending for a policy at a time. A pending edit is displayed in a summary view when clicking the **EDITS** link on the **Home** menu or the **POLICIES** link on the **Client** menu. The expanded summary view will give you pertinent information for the edit.

*	₽	Ø	CAuto-8765-2009 Commercial Auto		Monoline Auto - Comm	e 05/0 ercial 05/0	1/2009 1/2010	Pending All	\$4,500.00 A \$4,500.00 A	AIG Nationa AIG Nationa		
	Ħ		Stage	Status	Change	Coverage From	Coverage To	Action Description		Billed Premium	Updated By	Updated Date
	*	ø	Policy	In Force		05/01/2009	05/01/2010	🧔 Process edit.		\$0.00	Mary Oberleitner	07/30/2009
	2	<u>G</u>	Edit	Pending		05/01/2009	05/01/2010	🧔 Process edit.		\$0.00	Mary Oberleitner	10/01/2009

- Clicking the **Details** icon will display the **underwriting** tab for the pending edit.
- Clicking the Assign icon will display the Assignment List pop-up window with the list of people in the agency assigned to the policy.
- On the policy's header, holding the cursor over the Line of Business/Policy Number/Policy Description/Policy Type fields will display the information in a larger font for ease of reading. Clicking those items in the summary view will open a display box containing the selected information.
- The Stage seen on the single iteration of the policy and Status found on the policy's header are determined by Nexsure and will display Edit and Pending respectively.
- The Mode (New, New on Existing, Renew and Re-New-Co) and will display what mode the policy is currently in.
- The **Updated By** and **Updated Date** displays the person who updated the marketing quote along with the date it was updated and is found on the single iteration of the policy in expanded view.
- The Annualized \$ and Estimated amounts are found on the policies header while the Billed Premium is found on the single iteration of the policy, both billed and annualized are determined by Nexsure and display the annualized and billed amounts through posted invoices. The estimated premium populates from the policy info screen.
- The **Policy Term** will display the effective and expiration dates of the policy on the policies header.
- The Coverage Term will display the effective date of endorsements and/or expiration dates of cancellations on the single iteration of the policy.
- The **Issuing Carrier** displayed is the carrier writing the coverage and **Billing Carrier** displayed is the carrier who is billing the policy and both carriers are displayed on the policy's header as a link.
- The edit will need to be posted or aborted to remove it from the summary view.

HOW to Post or Abort a Pending Edit

To post or abort a pending edit:

- The pending edit can be accessed from the **Edits** link on the **Home** menu or from the **Policies** link on the **Client** menu.
- Click the Edits link on the Home menu. All pending edits, which fall within the search criteria, will

appear in a summary view. Each pending edit will have two **Details** icons.

- Clicking the second Details ricon displays the underwriting tab of the pending edit.
- If the edit changes have been completed, click the **Post Edit** link in the navigation toolbar under the header to post.
- The policy header is displayed in blue and copy of the policy, prior to the edit, is sent to history.
- Clicking on the **history** tab will allow access to a copy of the policy prior to the edit.
- If the edit is not needed, click the Abort link in the navigation toolbar under the header, click OK to confirm. The edit will be deleted and no record of it kept.

SE	ARCH ORGANIZATION F	EPORTS CAMPAIGNS			Bookmarks: Expand Add Rei	move Selected
NT PROFILE OPPORTU	NITIES MARKETING PC	OLICIES CLAIMS SERV	ICING ATTACHMEN	ITS ACTIONS TRAN	SACTIONS DELIVERY T-LOG	
nt Name: Lightship	Telecom, Inc.				► Com	imercial Accou
erwriting policy info	assignment attachments	actions qualification h	istory transactions	claims summary of in	surance classifieds delivery	
ranch: olicy Type/Primary State	Ace Insurance Branch	Policy Term: Coverage Tern	03/09/ 03/09/ 03/09/ 03/09/ 04/08/	12:01AM 2009 PST PST 12:01AM 2009 PST 2009 PST PST	navigation instruction ☐ Underwriting	navigation
ssuing Co:	Hartford Casualty Insu	ran(🔻 >> Stage:	Edit			
Silling Co:	Hartford Insurance Gro	up 🔻 >> Mode:	New			
olicy Number:	Unassigned	Status:	Pendin	g 🔲 Non-renewing		
olicy Description:		Origination Da	te: 03/09/	2009		
List	Print	Abort Edit	Post Edit	Save Changes		
tions: Petails Topic Ty Policy Edit Anno	pe Status tation Closed Process	edit to enter assigned Pol	Memo icy Number			

Admitted Carrier Identification

To identify admitted carriers on the policy underwriting screen, a check in the box on the header indicates that the carrier on the policy is admitted.

nevsure						
	EARCH ORGANIZATION	I REPORTS CAMP/	AIGNS ELINKS			
CLIENT PROFILE OPPORTUN	ITIES MARKETING	POLICIES CLAIMS	SERVICING ATTACH	IENTS ACTIONS TE	ANSACTIONS DELIVER	RY T-LOG
underwriting policy info as	signment attachments	actions qualificati	on history transactio	ns claims summary	of insurance Classifieds	delivery
Branch:	Southern	Insurance	Policy Term		08/05/2011 12: 08/05/2012 12:	01AM PST
Policy Type/Primary State:	Monoline	AL 💙	Coverage Te	irm i	11/07/2011 12: 08/05/2012 12:	01AM PST
Issuing Co:	Admitted Hartford		Stage:		Policy	
Billing Co:	Hartford		Mode:		Renew	
Policy Number:	GL-87987	987	Status:		In Force Non-	renewing
Policy Description:	General L	iability policy	Origination I)ate:	08/05/2005	
List	-	-	Print	History	In Force	Save Changes

If the carrier is not admitted, click in the box beside admitted to remove the check from the box. The **Save Changes** link on the **Navigation Toolbar** becomes active. Click the **Save Changes** link to save the change. The check can be added or removed without the policy being in a pending or future status. On policies that do not have a pending status, once the **Save Changes** link is clicked it is not available to select unless the box is clicked again.

nexsure					
SEARC	H ORGANIZATION REPORTS CAMP	AIGNS ELINKS			
CLIENT PROFILE OPPORTUNITIES	MARKETING POLICIES CLAIMS	SERVICING ATTACH	IENTS ACTIONS TR	ANSACTIONS DELIVER	Y T-LOG
underwriting policy info assignm	estruments ant attachments actions qualifications	on history transaction	ns claims summary o	of insurance classifieds	delivery
Branch:	Southern Insurance	Policy Term:		08/05/2011 12:0 08/05/2012 12:0	DIAM PST
Policy Type/Primary State:	Monoline AL 💌	Coverage Te	rm:	11/07/2011 12:0 08/05/2012 12:0	DIAM PST
Issuing Co:	Admitted Hartford	Stage:		Policy	
Billing Co:	Hartford	Mode:		Renew	
Policy Number:	GL-87987987	Status:		In Force 🗌 Non-	renewing
Policy Description:	General Liability policy	Origination D	ate:	08/05/2005	
List		Print	History	In Force	Save Changes

Summary of Insurance

The **summary of insurance** tab at policy underwriting of an In Force policy provides a summary view of policy information from the application(s). The **summary of insurance** (SOI) is available only for In Force policies at client level, but at policy level the summary may be accessed for the pending or submitted changes. If coverage does not exist, then the field will not show up on the summary of insurance. Although if a limit exists in a schedule for one item but not the others, then the blank fields will be displayed in order to show the one where coverage does exist.

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unden	writing	policy int	o i assignm	ent attachments	actions	qualification history tra	insactions 👘	claims summary of i	nsurance classifieds	delivery		
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Ve Nu	ehicle Imber	Year	Make	Model	Body Type	Vehicle Identification Number	Garaging City	Garaging State/Province	Comprehensive Deductible	Collision Deductible	Total Premiu	
	1	2001	FORD	F550	Pickup Trucks, Sedan	1FDAF56F71EB01905	West Palm Beach	FL	\$1,000.00	\$1,000.00	\$1,015.(
	2	2003	JEEP	LIBERTY	Other	1J4GK58K73W650533	West Palm Beach	FL	\$500.00	\$500.00	\$1,016.(
	3	2003	CHEVY	SILVERADO	Pick-up Truck (used	1GCEK19T93E295660			\$500.00	\$500.00	\$1,017.(
	4	2004	CHEVY	SILVERADO	Pickup Trucks, Sedan	1GCEC14XX4Z284099	West Palm Beach	FL	\$500.00	\$500.00	\$1,018.(
	5	2004	FORD	F550	Pickup	1FDAF56PX4EE04870	West	FL	\$1,000.00	\$1,000.00	\$1,019.(
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The **summary of insurance** tab at Client level provides a summary view of all In Force policies for the client if there are no restricted policies. If restricted policies are present, only those assigned to the restricted policy may access summary of insurance at client level.

To display just one line of business from the client **summary of insurance** tab, select **Line of Business** from the **LOB** list and click the **Refresh View** button. All other LOBs will be removed from the view allowing just the one to be viewed.

Exclude items from the summary by deselecting the check boxes under **Include** and then click the **Refresh View** button. Items that may be included or excluded are as follows:

- **Coverages** Coverage sections of the policy (defaults to selected).
- Premiums Premium fields on the form and the Premium Summary which populates from the policy info screen and is only available at SOI Client level. On the premium summary if taxes and/ or fees exist on any of the policies, the columns showing the taxes and fees will also display. If no policies have taxes or fees, only the premium column will display along with the static columns for policy #, coverage and carrier. (Defaults to checked)
- Schedules Schedule sections of the form such as vehicles (defaults to selected)
- **Expired Policies** Policies with a status of Expired (defaults to unselected)
- Deductibles Deductible fields from the form (defaults to selected)
- **Rating Info** Rating Information from the form (defaults to unselected)

- Other Fields selected as SOI only. (No other field attributes apply, such as coverages, rating info, deductible or premium) (defaults to selected)
- Named Insureds Check box to display master named insured schedule from client profile. Named insured schedule is only available at client level summary of insurance. (defaults to unselected)

Note: Check box selections will hold during user's entire session. Once user logs out, the check boxes will be reset to defaults as noted above. These check box options are not available via NIC access.

A print link has been added to the beginning of each schedule listing to print just that schedule. The Schedule will print as it appears on screen with a title of what the schedule is such as Schedule of Vehicles, Schedule of Drivers, etc.

Note: The selection of landscape print option is available from print dialog box. Make sure to check printing orientation since this is not controlled by Nexsure.

To expand/collapse the schedules a +/- is available so that when selected the schedule will display or hide individually as selected. The default for schedules is in expanded view.

The summary of insurance may be printed and exported to Word or Excel. Make sure to take advantage of the Microsoft Word Tools to format the Summary of Insurance. Whatever is displayed on the screen will be exported, so for example if the schedules are collapsed, they will not print or export.

For example after exporting to Microsoft Word, it is easy to change the font by first selecting all text in the document. This is done by pressing the Control (**Ctrl**) key and the letter **A** on your keyboard. All text will be highlighted. To reduce the font size, press the **Ctrl + Shift** keys and the letter **P** on your keyboard to bring up the font selection box. If there are some wide schedules in the document try a small font size such as 8.

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Coverages - Auto Liability - (7) Autos Specified on Schedule: Liability - (8) Hired Autos Only: Liability - (8) Hired Autos Only: Liability - (9) Non-Owned Autos: Liability Type: CSL Limit - Liability CSL/BI Each Person: \$2,000,000.00 Medical Payments - (7) Autos Specified on Schedule: Medical Payments - (8) Hired Autos Only: Uninsured Motorist - (7) Autos Specified on Schedule: Uninsured Motorist - (7) Autos Specified on Schedule: Uninsured Motorist Type: CSL Limit - Uninsured Motorist CSL/BI Each Person: \$120,000.00 Hired/Borrowed Liability: Yes Hired/Borrowed Liability: 1f Any Basis:	H-readings Heightist Agency PB Heightist Agency PB Bid Tallo Arial Black Bid Tallo Font glor: Underline style: No Color Image: Style Structure B Strigetrough B Stadl caps B Subjectrict B All caps B Subjectrict B Engrave
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Experiment by changing the font until the desired result is returned. Next, try changing the orientation. Click the **Page Layout** tab, select **Orientation** and choose **Landscape**.

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Landscape	Summ	ary of Insurance			
Prepared for: Miller Florist and Gifts 38 East Hamric Drive Oxford, AL 36203	-				
	Auto	- Commercial			

Preview the document prior to printing by selecting **Print Preview**.



Previewing the document provides the opportunity to see what the paper version looks like. The schedule headings will carry over to the next screen when the schedule crosses multiple pages and a page break will exist between each line of business to provide a professional look.

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				1	2001	FORD	F550	Pickup Trucks, Sedan	1FDAF56F71EB0	1905	West Palm Beach	FL	\$1,000.00	\$1,000.00	\$2,000.00	
				2	2003	JEEP	LIBERTY	Other	1J4GK58K73W65	0533	West Palm Beach	FL	\$500.00	\$500.00		
				3	2003	CHEVY	SILVERADO	Pick-up Truck (used	1GCEK19T93E29	5660			\$500.00	\$500.00		
				4	2004	CHEVY	SILVERADO	Pickup Trucks, Sedan	1GCEC14XX4Z28	4099 1	West Palm Beach	FL	\$500.00	\$500.00		
				5	2004	FORD	F550	Pickup Trucks, Sedan	1FDAF56PX4EE0	4870	West Palm Beach	FL	\$1,000.00	\$1,000.00		
				6	2005 C	CADILLAC	ESCALADE	Private Passenger Ra	1GYEK63N55R16	4965	WPB	FL	\$1,000.00	\$1,000.00		
				7	2005	FORD	F250 4x4,	Pickup Trucks, Sedan	1FTSX21525EB2	5817			\$500.00	\$500.00		
				8	2005 C	HEVROLET	SILVERADO	Pickup Trucks, Sedan	1GCHK29U25E24	6640			\$500.00	\$500.00		
				9	2005 C	HEVROLET	SILVERADO	Pickup Trucks, Sedan	1GCHK29U35E17	6873	West Palm Beach	FL	\$500.00	\$500.00		
				Drivers S	chedule											
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If desired, you may save the exported document locally and then attach to the client's file. For attaching documents, see "Attachments", in Chapter 17 of this manual.

Note: For downloaded policies, the overflow pages will be included in the summary of insurance display.

The summary of insurance disclaimer may be customized for client types of commercial and personal separately in **SETUP**. For instructions, see "Color Schemes and Blank Forms", in Chapter 5, *Admin Training Manual*.

Where to Locate Fields Mapped to the Summary of Insurance

To see what fields are mapped to the summary of insurance, locate the policy and access the underwriting screen. (From Client Policies, click the policy **Details** icon)

CLIENT PROFILE	OPPORTUNITIES M	ARKETING	POLICIES CLAIMS	SERVICING ATTACHM	ENTS ACTIONS	TRANSACTIONS DELIVERY T-	LOG	
Client Name:	Miller Florist and Gi	ifts					•	Commercial Account
policies history	certificates binders	verification	summary of insurance	•				
				II ≤ Show	ing Page 1 of 1 🕨 🕅	1 💌	[Show Active] [Expansion	d All] Filters: [Show]
Show/ Hide	Policy Numb Policy Descrip	oer otion	Policy Type Line of Business	Policy Term	Status Mode	Annualized Premium Estimated Premium	Billing Carrier Issuing Carrier	
* 🖻 🤹	CPP-879798-N Existing Package Policy	New- / exp	Package	06/09/2008 06/09/2009	In Force New on Existing	\$6,000.00 A \$3,000.00 A	Auto-Owners Insurance Company Auto-Owners Insurance Company	
Package Incl	udes: General Liability -	Commercial,	Property - Commercial					

On the **underwriting** tab, click the ACORD form number in the middle part of the screen to display the **Dataflow** screen.

derwriting	policy info	assignment atta	achments actio	ns qualificatio	n history transactions	claims summary	of insurance classifieds	delivery	Commercial Acco
Branch: Policy Ty Issuing (Billing Co Billing Co Policy Nu Policy De	pe/Primary Stat Co: :: mber: :scription: List	e; -	Anniston Insur Package AL Auto-Owners In Auto-Owners In CPP-879798-Ne Package Policy	nsurance Agency surance Compa surance Compa sw-Existing exp 2008	Policy Term: Coverage Tern any Stage: any Mode: Status: Origination Da Print	n: te: History	06/09/2008 12:0 06/09/2009 12:0 06/09/2008 12:0 06/09/2009 12:0 Policy New on Existing In Force Non- 06/09/2008	1AM 19 1AM 19 1AM 19 enewing Save Changes	navigation instruction Underwriting Base Requirements Bese Requirements General Liability - Commercial Property - Commercial instruction Instruction navigation
ctions: Details	Topic	Type	Status			Memo			
P	Policy Edit	Annotation	Closed	Process edit.		[Impor] [ACORD XML] [Supplen	ents] [Add Application]	
aseron	Fo	rms			Des	cription		Remove	
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	ACOF	D 125			Commercial	Application 125		-	
ine of B	siness:		Eon	n		Descriptio			
ine of B	Lines of E	usiness	1011						
ine of B	Lines of E General L Comm	iability - ercial	ACORD	126	Con	nmercial General Liab	ility Section 126	E.	

Click the arrow on the right to open up the summary of insurance portion of the **Dataflow** screen.

ive Form Docur	nentation			ne sure
Policy application LOB) form data and ACORD 71) n the change re equest service f Request forms, nain form, wher Click here to	n forms are suppor mapping for each are used first, if t quest service tran form when change sections with sche n applicable. Pleas submit a request	orted in all service tr h respective service there are additional nsactions, all policy is are identified. Ci dules are prefixed se note that supple to our support dep	ansactions where applicable. The reports lis transaction operation. The main service for sections/Fields, the Binder Overflow pages i form Section fields are analyzed by the syst anges are clearly identified on the change by a number showing the maximum number mental forms are not included in the binder artment.	ted below display the line of business ne (ACORD 75s, ACORD 175, ACORD 70 re used en and they are imported onto the change request overflow pages. On the Change 'of records that can be entered on the and change request dataflow operations.
	Dataflow Mapp	ing For Form: 155	9 ACORD 126	
Binder				*
22	Source:	ACORD 126	Target:	ACORD 75s
Change Re	equest			*
22	Source:	ACORD 126	Target:	ACORD 175
Claim				*
12 12	Source:		Target:	
Certificate				*
	Source:		Target:	
Summarv	of Insurance			*
12	Source:	ACORD 126	Target:	SOI HTML Report

Scroll to see what fields are flagged. Selected fields are included on the **Summary of Insurance** as follows:

- **SOI** = Appear on the Summary of Insurance.
- **RTG** = Appear on the Summary of Insurance if the **Rating Info** box is checked on the Summary of

Insurance at Client or Policy level.

- CVG = Appear on the Summary of Insurance if the Coverages box is checked on the Summary of Insurance at Client or Policy level.
- **DED** = Appear on the Summary of Insurance if the **Deductible** box is checked on the Summary of Insurance at Client or Policy level.
- PREM = Appear on the Summary of Insurance if the Premium box is checked on the Summary of Insurance at Client or Policy level.

Summary of Insurance				*
Source: ACORD 126		Target: SC	II HTML Report	
SoiRtgCvgDedPrmSource Section	Source Label			
Producer	Producer Name			
FFFFFProducer	Address - Street			
Producer	City			
FFFFFProducer	State/Province			
Producer	Zip/Postal Code			
FFFFFProducer	Phone Number			
Producer	Web Site Address			
F F F F Producer	Producer Code			
Producer	Producer SubCode			
Applicant	Application Date			
FFF Applicant	Applicant Name (First Named Insured)			
FFFF Applicant	Agency Customer ID			
E E E E Billing	Effective Date			
FFFF Billing	Expiration Date			
E E E Billing	Billing Method			
FFFFBilling	Payment Plan			
FFFF Billing	Audit Code			
FFFF Billing	Products Premium			
E E E E Billing	Premises/Operations Premium			
FFFFBilling	Other Premium			
FFFF Billing	Total Premium			
Part 1	Commercial General Liability - Basis			
Part 1	Owners & Contractors Protective			
Part 1	If Other Coverage - Description			
Part 1	Property Damage Deductible - Amount			

LOB: All Quick Navigation Quick Navigation Unclude: B Auto - Commercial	policies history certificates binders verifications summary of insurance		
Include:	LOB: All	😂 NIC 📓 Export 👿 Export 🔿 Print	Quick Navigation
Image: Coverages Image: Coverages <td< td=""><td>Include: Image: Image</td><td>Refresh View</td><td>Auto - Commercial General Liability - Commercial Glass and Sign Property - Commercial</td></td<>	Include: Image: Image	Refresh View	Auto - Commercial General Liability - Commercial Glass and Sign Property - Commercial
B Print Schedule Workers Compensation		📇 Print Schedule	Umbrella - Commercial Workers Compensation

The **Summary of Insurance** may be printed or exported to Microsoft Word or Excel. Nexsure Instant Collaborator, **NIC**, grants temporary access to clients allowing them to view and print their **Summary of Insurance** document.

To grant temporary access to a client contact, click the **NIC** link. The **Security - Create Temporary User** dialog box displays.

Security	ne sure
Please select client contact and complete information in order to grant nsurance. The contact will be given a temporary access code to provide view their insurance summary.	access to the summary of a them with one time access to
Create Temporary User	
	[Close] [Send]
Client Name: Powers Construction Co., Inc.	
Select Contact: George Powers : nexsurecontact@aol.com 💌	
Login Expires in: 3 days 💌	
Send the following message:	
Please review the summary of insurance.	×
Note: The temporary access code will be automatically included in the	e e-mail message.
	Create Temporary User

- Select the contact to be given temporary access.
- Select the number of days when the login is to expire.
- Edit the message with personal instructions for the contact.
- Click [Close] to abort or [Send] to send the access invitation to the contact.
- When the "Successfully created temporary user login" message displays, close the dialog box.

The contact will receive an email invitation with a login link.

🔵 Temporary Nexsure Login 🍽	🖨 Print 🗗 New Window
betsy.cormier to you - 1 min ago More Details	Add to: To Do, Calendar
Hello,	
You have been granted temporary access to Nexsure. You can login automatically by clickin	g the following URL:
https://www.nexsure.com/tmp_user_login.asp?email_address=nexsurecontact@aol.com∾ Oj4%3dNy6%2c	.cess_code=Jz1%26Ux8-
If this URL didn't work, please click the URL below and enter your email address and access https://www.nexsure.com/tmp_user_login.asp	code.
This is your temporary access code: Jz1&Ux8-Oj4=Ny6,	
Please note that your access expires on Saturday, February 14, 2009	
Below is the message from the person who requested your temporary login:	
Please review the summary of insurance.	

Clicking the link displays their **Summary of Insurance** with a **Print** link and a **Logout** link.

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	Sun	imary	of insural	ice				
Prepared for: Powers Cor	nstruction Co., Inc.							
Line of Business	Policy Number	Polic	y Term		Carrie	r		
Workers Compensation WC1234 03		03/0	- ;/09/2008 - 03/09/2009			Hartford Casualty Insurance		
Premises Info								
Location Number of Premises	Location Addre Street	255 -	City	State/Pro	vince	Zip/Postal Code	County	
1	1000 Elm Stre	et	Manchester	NH		03108		
WC Rating Info								
Record 1								
Rating State/Province Assoc	ciated with Location						CO	
Policy Wide Coverage	5							
Workers Compensation (States)			CO					
Employers Liability - Each Accident			\$1,000,00	0				
Employers Liability - Disease - Policy Limit			\$1,000,00	0				
Employers Liability - Disease - Each Employee			\$1,000,00	0				
Other States Ins			All States except ND,OH, WA, WV, WY and CO					
		— Plea	se Note					

You will receive a **Temporary user status update** email notification with the date and time the Contact completed their task. Temporary access terminates the earlier of the Contact logging out or when the temporary login was set to expire.

