Chapter 9

Nexsure Certificates

In This Chapter

- Adding a Certificate
- Posting a Certificate
- Delivering a Certificate
- Certificates Tab Summary Views
- Maintaining Certificates
- Exporting and Importing Holders
- Renewing the Certificate

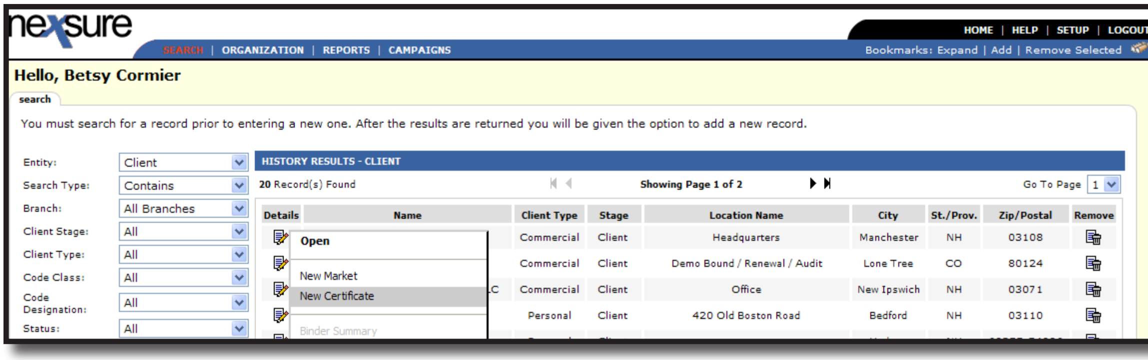
Nexsure Certificates are available to issue Certificate of Insurance and Evidence of Insurance forms to Certificate Holders and Additional Interests for Personal Lines and Commercial Lines clients. A certificate form is created and issued to one or multiple Holders/Additional Interests in a single process. Once issued the certificate is printed or delivered to each Certificate Holder / Additional Interest, Carrier and Insured. The certificate is a permanent record that cannot be altered after it is issued to a Certificate Holder/Additional Interest.

Adding a Certificate

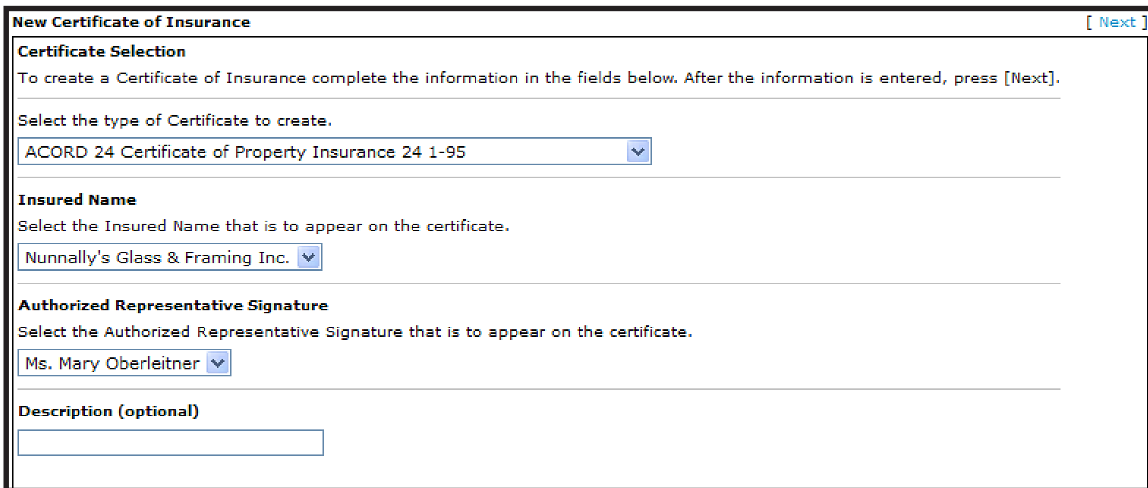
The first step in the certificate process is to create the appropriate form that will be issued to Holders/ Additional Interests. The policy or policies that will be represented on the Certificate or Evidence form must be in force. Security rights must be granted to add a new certificate.

HOW to Add a New Certificate

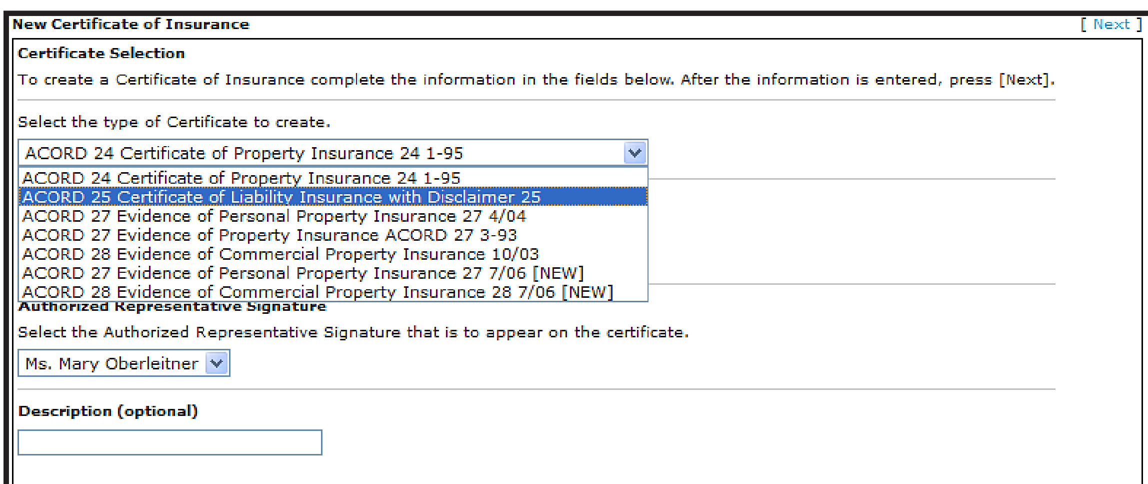
- Locate the appropriate client through **SEARCH.** Click the client's **Details** icon to access the client profile**. Click** the **SERVICING** link on the **Client** menu.
- Click the **New Certificate(s)** link.
- The new certificate may also be added using the Client Search Context Tool. Once the client has been located through **SEARCH**, right-click on the client's **Details** icon. Select the **New Certificate** option on the context menu.



- The **new certificate** tab is displayed.



- Select the appropriate **ACORD Certificate** from the list. The certificate form selected will determine the lines of business available to populate the form.

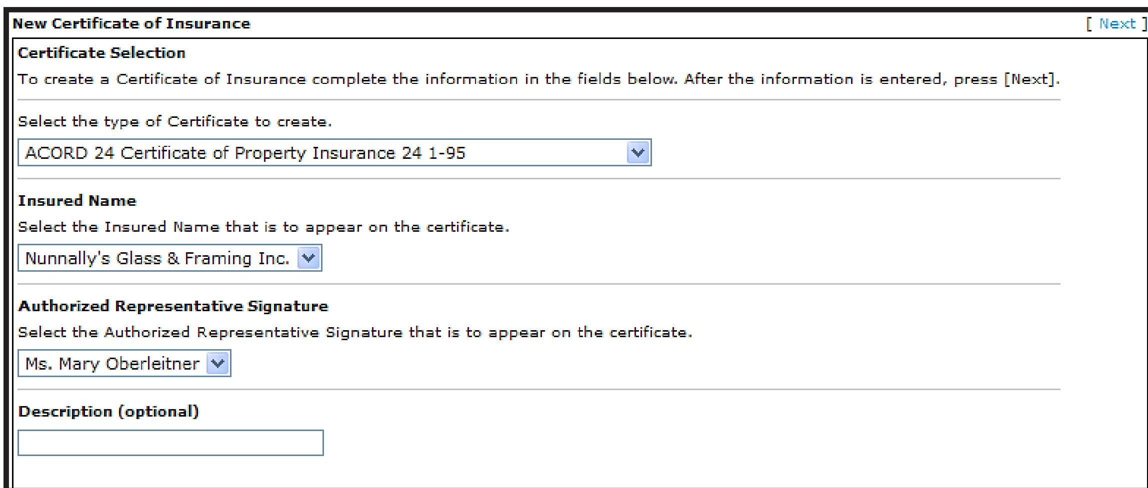


- Select the **Insured Name** to appear on the certificate from the list. The names available in the list are determined from the **named insured** tab of the client. If the named insured to be used on the certificate is not available in the list, it will need to be added to the client on the **named insured** tab.

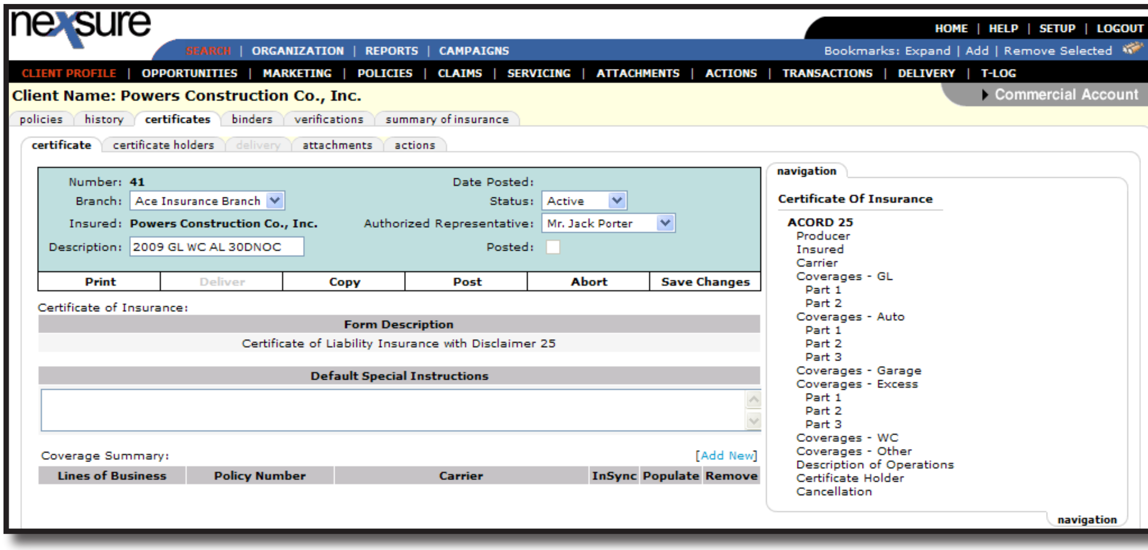
- Select the **Authorized Representative Signature** to appear on the certificate from the list. Only signatures authorized for use are listed.

Note: See the Nexsure point person in your agency to add a signature to your employee file if needed. For instructions on how to add signatures, see "Employee Record Maintenance", in Chapter 2, *Admin Training Manual*.

- Enter a **Description** if applicable. A description is optional and can be used to identify job numbers, policy term, number of days cancellation, etc. Descriptions help identify certificates in summary views and in Delivery. The description will be displayed in the certificate header and may be edited until the certificate is posted. The description will not appear on the certificate itself.



- Click the **[Next]** link and the **certificate** tab is displayed. The certificate header is displayed in light teal color.

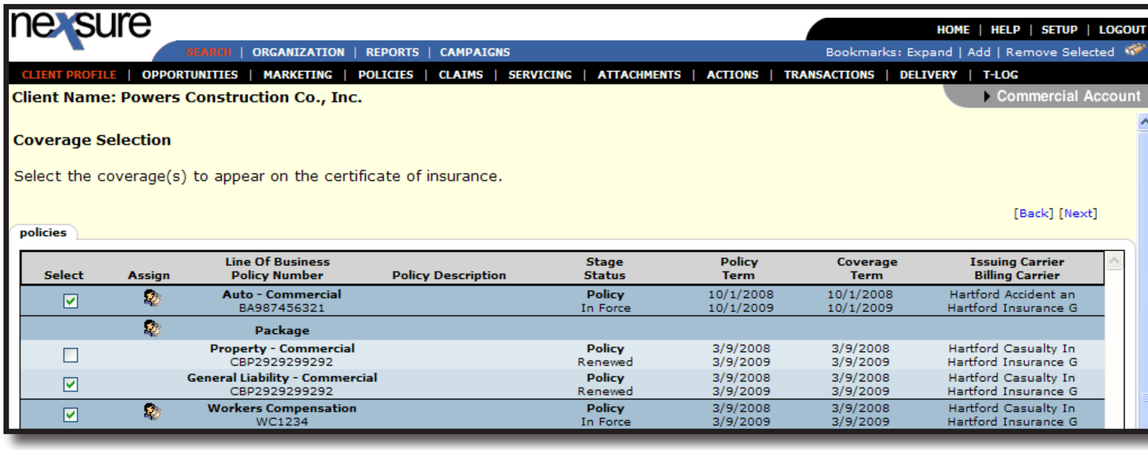


- The certificate is assigned the next available certificate number in Nexsure.
- The **Branch, Insured Name, Description** and **Authorized Representative** signature default from the **new certificate** tab input.
- The certificate **Status** in the header will display as **Active**. The status can be changed to **Inactive**, **Cancelled** or **Renewing**.
- The **Date Posted** and the **Posted** check box will populate when the certificate is posted and cannot be modified.
- If changes are made to the certificate header, click the **Save Changes** link under the header to save. Changes can be made to the header until the certificate is posted.

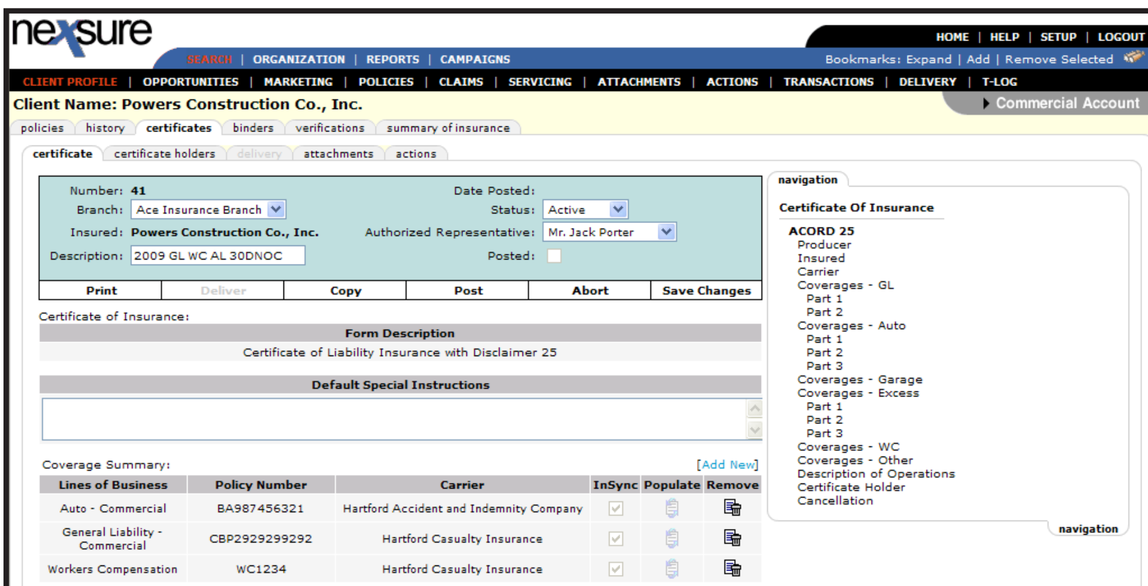
HOW to Populate a New Certificate Form

The Certificate of Insurance Form selected on the **new certificate** tab, Default Special Instructions and the Coverage Summary will be displayed beneath the certificate header and the selected certificate ACORD form is available in the **navigation** tab.

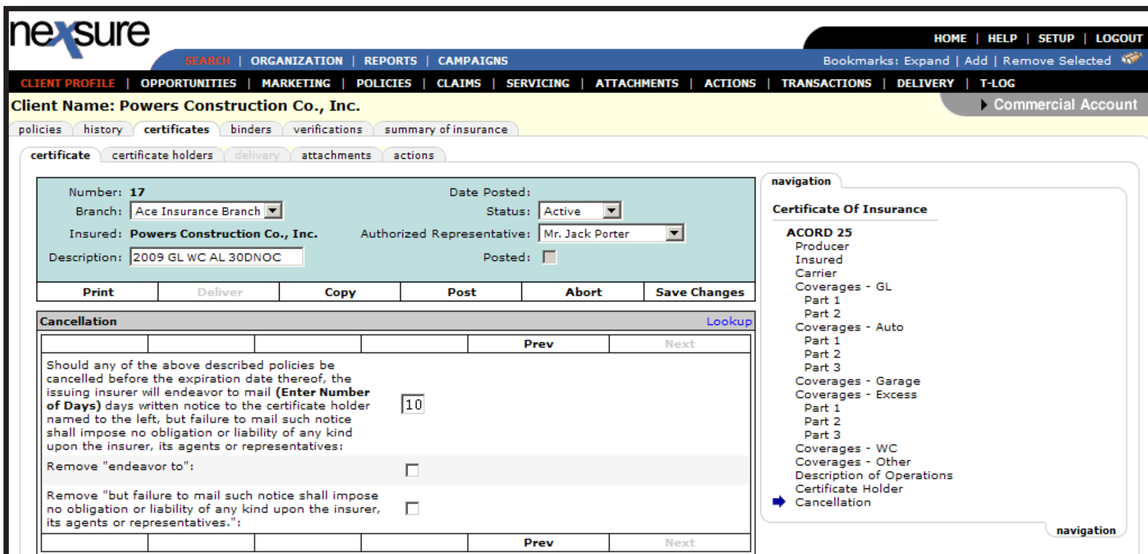
- The **Default Special Instructions** area is used for special wording that applies to all certificate holders added to and issued a copy of this certificate. Leave this field blank if special instructions aren't necessary or if the special instructions are unique to an individual holder.
    - If the **Special Instructions** apply to ***ALL*** Certificate Holders/Additional Interests that will be added to this certificate, enter the **Default Special Instructions** in the text field.
    - Click the **Save Changes** link under the certificate header to save the changes.
- Click the **[Add New]** link to the right of the coverage summary to add all applicable Lines of Business to the certificate.



- All lines of business containing coverages applicable to the selected certificate form are displayed.
- Click the appropriate check boxes of all applicable Lines of Business to appear on the certificate, click the [**Next**] link. Click **[Back]** to return to the **certificate** tab.
- The selected lines of business are displayed beneath the Coverage Summary. The **InSync** check box is checked and the **Populate** icon is grayed out. The information from the selected applications is automatically populated into the certificate form.



- The **Cancellation** section of the certificate form must be completed manually. The certificate form is available for editing in the **navigation** tab on the right side of the screen. The line of business applications selected must be populated at policy level to populate to the certificate form. Some fields, such as WC statutory limits or the number of days cancellation, do not populate to the certificate because they do not exist on the ACORD application. Manually enter information that does not automatically populate to the certificate form.
    - Click the **Cancellation** link in the **navigation** tab. The form will open on the left side of the screen below the certificate header for editing.
    - Enter the **Number of Days** the issuing company will endeavor to mail cancellation notices to all certificate holders.
    - Clicking one or both of the Remove check boxes to cross out the wording shown in the cancellation clause section of the certificate.
    - Click the **Save Changes** link in the navigation toolbar below the certificate header to save the changes.



- If other manual changes need to be made to the certificate, click the appropriate link in the **navigation** tab.
- See "HOW to Work with Forms" in Chapter 5, "Marketing" of this manual for assistance in editing other sections of the form.

Note: The **Description of Operations** link on the **navigation** tab is a placeholder for information entered on the certificate **Default Special Instructions** and the **Description of Operations / Special Instructions** of a certificate holder. Do not key any information in the **Description of Operations** section of the form from the link on the **navigation** tab. Certificate Holders are added to the **certificate holders** tab and not through the link on the **navigation** tab.

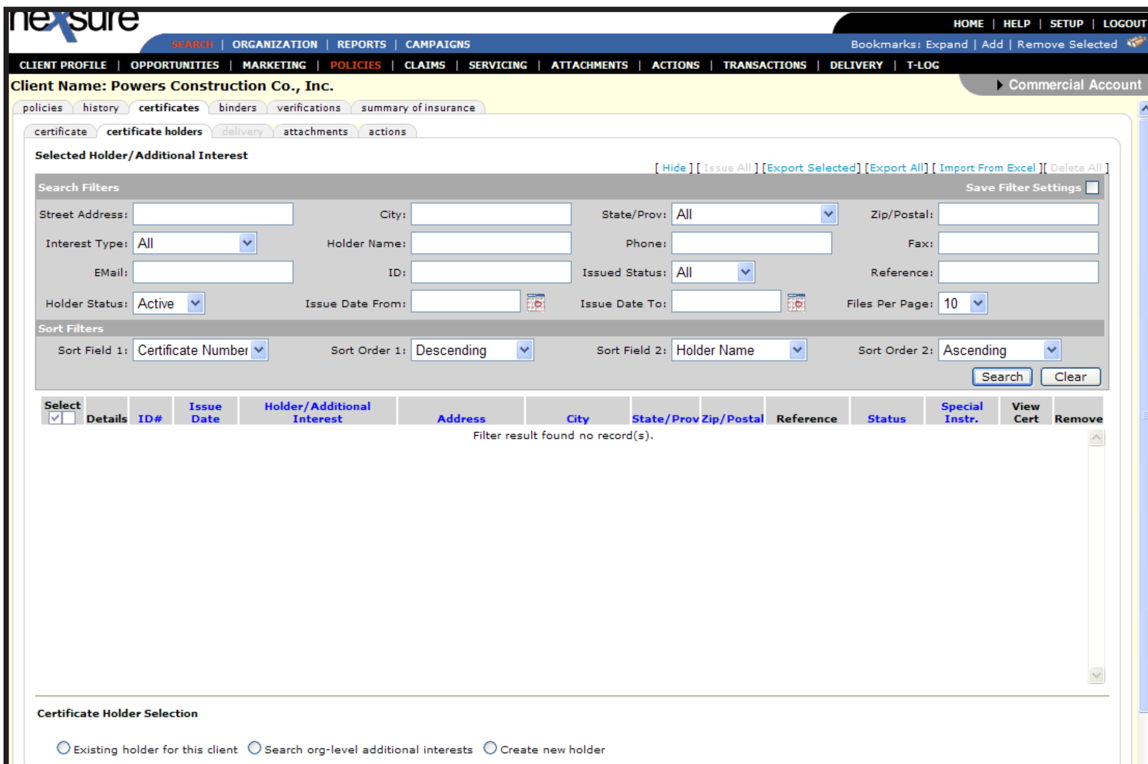
- Once all changes are made and saved, click the words **Certificate of Insurance** at the top of the navigation tree to close the form.

Note: If manual changes are made to the form the **Populate** link will become active again and the InSync check box will no longer be checked. If the **Populate** link is initiated after the form has been altered, keep the following in mind: If manual changes are made to fields that contain data that populated from the original LOB application, or that are blank but exist in the original LOB application, when they are repopulated, these data fields will be overwritten with the original LOB data. Any manual changes made to data fields that do not populate from the original LOB will not be overwritten.

HOW to Add Certificate Holders and Additional Interests

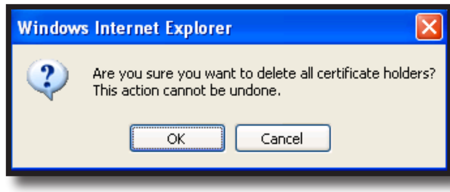
Certificate holders and additional interests are added to the certificate from the **certificates holders** tab.

- Click the **certificate holders** tab to add certificate holders.



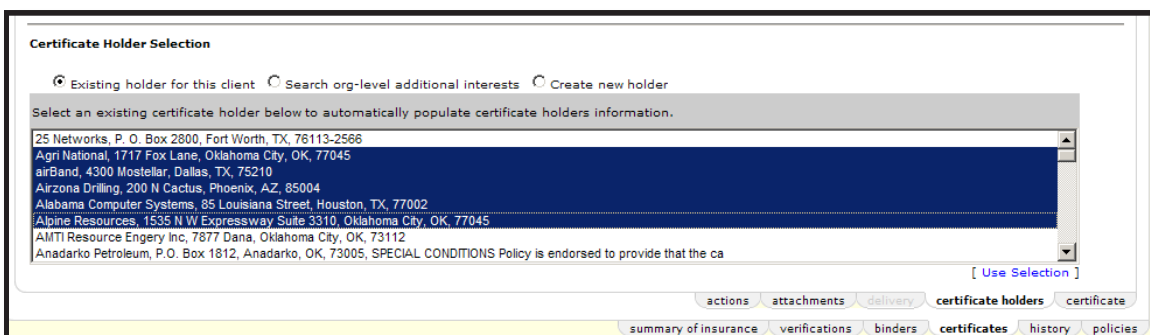
- The **Search Filter** displays if holders have not been added to the certificate. Certificate holders and additional interests added to the application(s) are automatically added to the certificate. Remove any holders that will not be issued a certificate by clicking the **Remove** icon or click the **[Delete All]** link to remove all holders at once.

- A warning dialog box displays, click **OK** to remove all the holders. Click **Cancel** to abort.



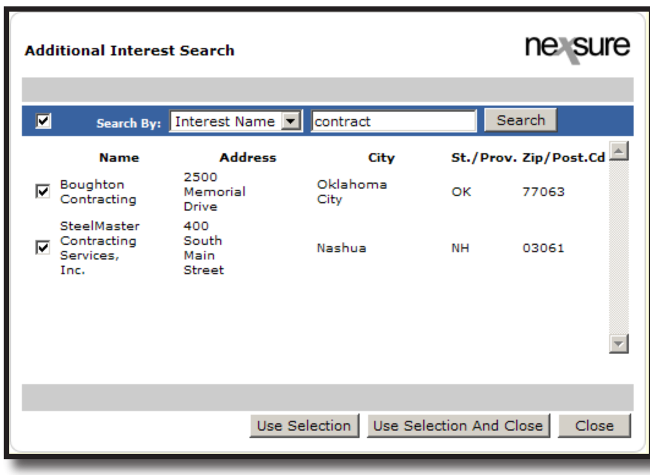
There are three options for adding certificate holders at the bottom of the **certificate holders** screen:

- **Existing Holder:** This allows an existing active holder, previously used on the client, to be selected from the existing certificate holder selection box.
    - Click the **Existing Holders** option.
    - Click on the appropriate **Certificate Holder,** available in the existing certificate holder selection box, to highlight it. Press and hold the **Shift** key to select a range of existing holders or press and hold the **Ctrl** key to select multiple holders.
    - Click the **Use Selection** link.
    - The certificate holder is added and available under the Selected Holder/Additional Interest list with a unique ID number.
    - Repeat the above steps to add other **Existing Holders**, if necessary. To search for holders that have been added globally to Nexsure continue to the **Search org-level additional interests**.



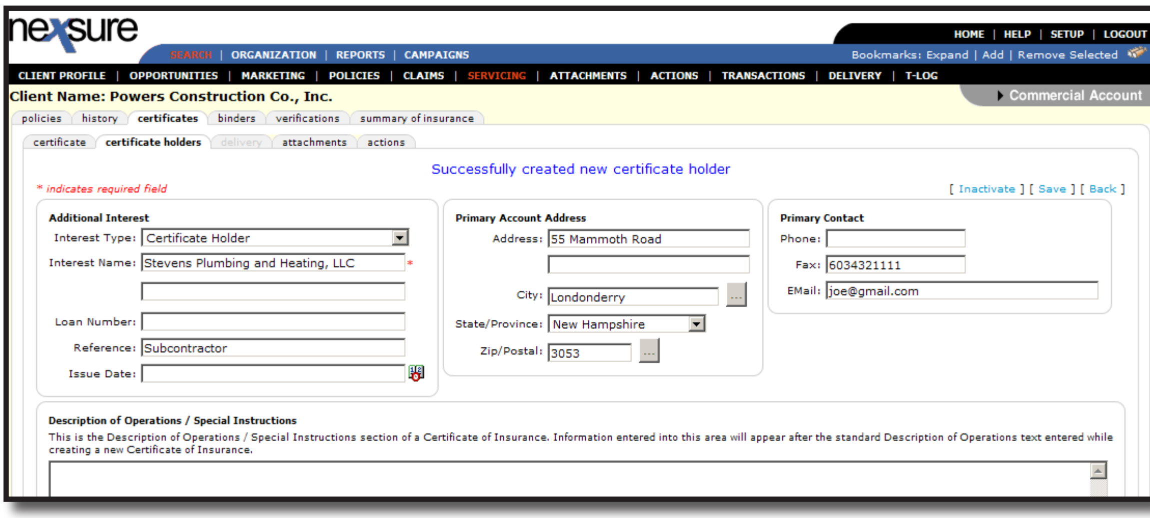
- **Search org-level additional interests:** This allows a search of all Certificate Holders and Additional Interests, entered globally through **SEARCH,** in the Nexsure database. All holders matching the search criteria will be displayed and available for selection.
    - Click the **Search Holders** option.
    - The Additional Interest Search dialog box appears. Select the **Search By** criteria from the list.
    - Enter at least two characters in the search field, alpha or numeric depending on the **Search By** criteria selected, and click **Search**.

- All holders matching the selected criteria will be displayed. Place a check in the check box next to each additional interest to be added to the certificate. Select all additional interests at once by placing a check in the small box to the left of **Search By**. Click the **Use Selection** button to add the selected additional interests to the certificate, leaving the **search** dialog box open to continue searching for holders. Click the **Use Selection** and **Close** button to add the selected additional interests and close the **search** dialog box. Click **Close** to close the selection dialog box without adding any additional interests to the certificate.
- The selected holder is added and available under the Selected Holder/Additional Interest list with a unique ID number.
- If a match is not found and an unsuccessful search result is returned, continue to the **Create new holder** section to add a new holder to the certificate.

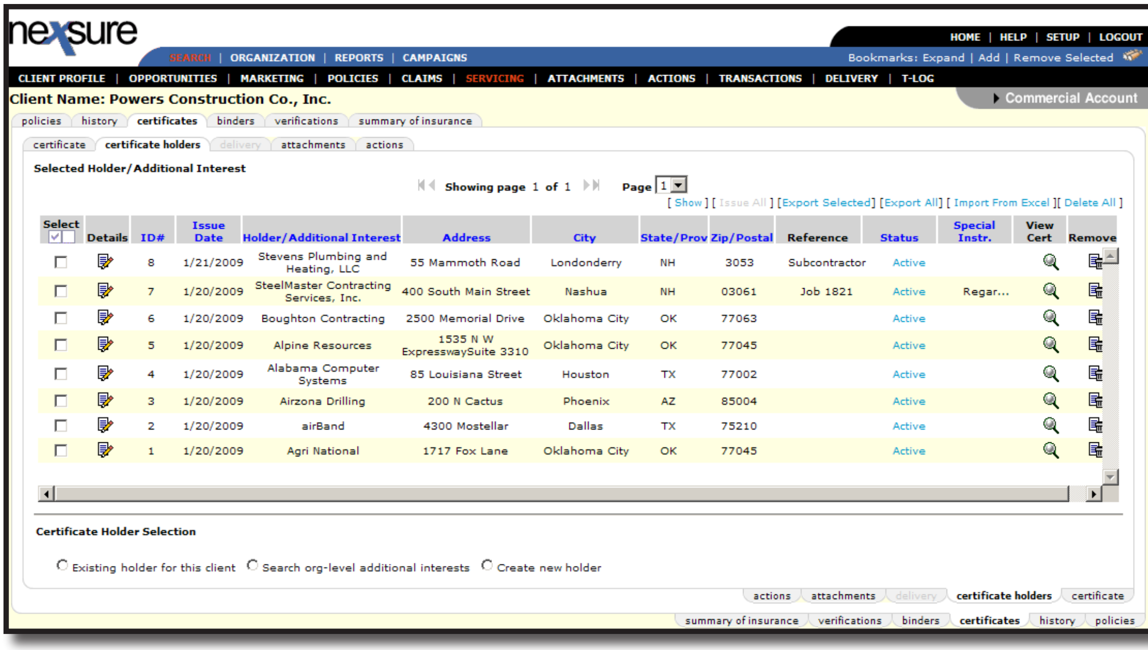


- **Create New Holder:** Adding a new holder to the certificate using the **Create new holder** option will not add the holder globally in Nexsure. If the new holder will be used again, add the holder to the **Additional Interest** entity in **SEARCH**. Certificate holders and additional interests entered through **SEARCH** are added to a global database and are available to use on any client in Nexsure.
  - After an unsuccessful search has been conducted using the **Search Org-Level Additional Interests** option, click the **Create new holder** option.
  - The Certificate Holders Additional Interest screen will be displayed.
  - Select the **Interest Type** from the list and enter the **Additional Interest** name. Enter the **Loan Number** and a **Reference**, if applicable. The reference is for your records only and displays on summary views and existing holder selection lists. The reference does not display on the issued certificate. Enter the **Primary Address** and **Contact** for the new holder.
  - Entering the **Fax** and **EMail** address for the holder will make them available to select on the Address Book using the Entity type of Certificate Holder Location when delivering the certificate from Nexsure.

- If Special Instructions are needed for this holder, enter the instructions in the **Description of Operations / Special Instruction** text box. Certificate holder Description of Operations / Special Instructions print on the holder's certificate in addition to any default special instructions saved on the certificate tab. Lengthy Description of Operations / Special Instructions will be continued on a separate page of the issued certificate.
- Click the **Save** link in the upper right corner to save the Additional Interest information. Click **[Back]** to abort.



- A "Successfully created new certificate holder" message displays. The new holder may be modified until it is issued.
- The holder's **[Inactivate]** hot link is available after the new holder record is created. For information on Inactivating holders, see "HOW to Inactivate a Certificate Holder" later in this Chapter.
- Continue adding new certificate holders as needed. To return to the **certificate holders** tab summary view, click the **[Back]** link or click the **certificate holders** tab.



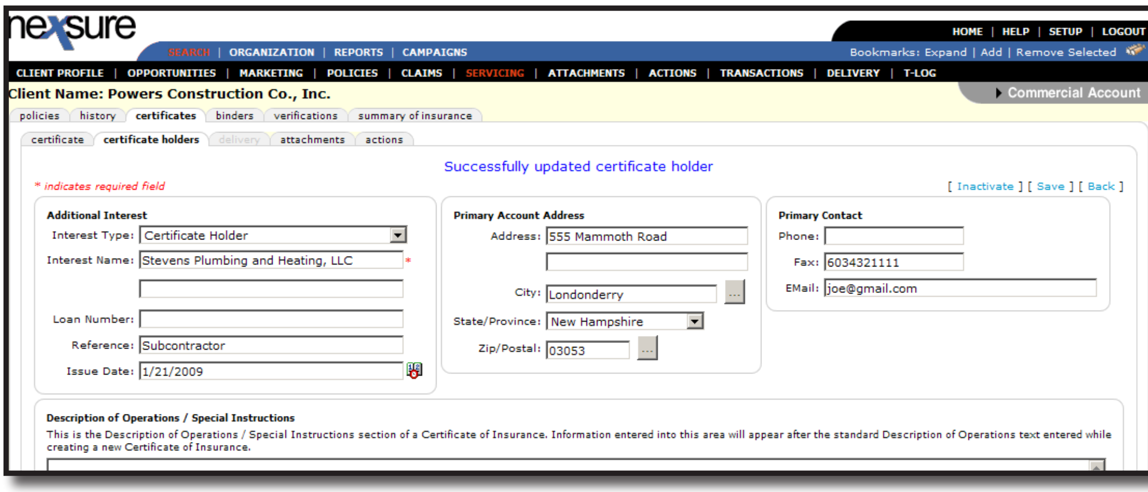
HOW to Modify Certificate Holders

All certificate holders and additional interests that have been added to the certificate will be displayed on the **certificate holders** tab in a summary view. The summary view will give you pertinent information regarding each certificate holder. Holder information may be modified until the holder's certificate is issued.

Column Header	Description
Select	Select or de-select holders to [Export Selected] to Excel.
Details	Click the Details icon to display the selected Holder/Additional Interest information.
ID#	Nexsure assigns the next available ID# to each certificate holder as they are added to a certificate.
Issue Date	The Issue Date defaults to the date the certificate holder/additional interest was added to the certificate. The Issue Date may be changed on the certificate holder details until the holder's certificate is issued.
Holder/Additional Interest	Name entered in Interest Name fields of the holder's details.
Address, City, State/Prov, Zip/Postal	The certificate holder/additional interest's address information is displayed.
Reference	Any Reference added to certificate holders is displayed. References are internal notes and do not appear on the holder's certificate.
Status	New holders default with a Status of Active. Use the [Show] link to search for and display holders with an Inactive status. The default view displays only Active holders.
Special Instr.	Any Special Instructions added to a certificate holder will be displayed. Holding the cursor over the Special Instructions field will display all information entered in the Description of Operations / Special Instructions text box in a larger font for ease of reading.
View Cert	Click the View Cert icon to view the certificate in Adobe Acrobat for accuracy. It is the responsibility of the end user to verify that the form is populated in accordance with the specific requirements of the issuing company for the policies listed.

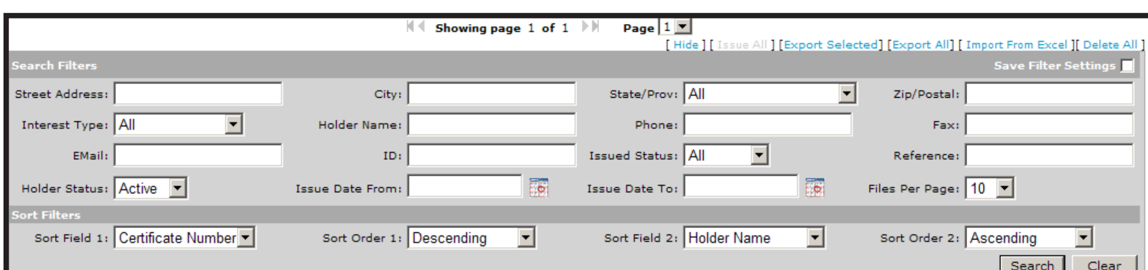
Column Header	Description
Remove	The Remove icon displays for users with rights to Delete Certificate Holders. Certificate Holders that have been issued a certificate cannot be deleted and display an inactive Remove icon.

Click the **Details** icon to display and modify if needed, the holder's information. See "Create New Holder" earlier in this Chapter for help entering holder information. Click the **[Save]** link to save changes made to the record. Click the **[Back]** link or **certificate holders** tab to return to the **certificate holders** tab summary view and modify other holders if necessary. Clicking the **[Back]** link or **certificate holders** tab will abort any un-saved changes.



A large number of holders may be displayed over multiple pages. Use the **certificate holders** tab **[Show]** link to display search filters and locate certain holders, change the number of files displayed per page, or to change your personal default view of the **certificate holders** tab.

Note: Clicking the filter's **[Show]** link displays the search criteria defaults set by Nexsure or specified by the user. The holders displayed when the **certificate holders** tab is first clicked are based on the defaults setup in this filter. The filter can be saved according to the user's specifications by entering the desired default search criteria, placing a check mark in the **Save Filter Settings** check box and clicking the **Search** button. Use caution when searching for holders using date criteria. Any dates entered are saved with all other search criteria when the filter settings are saved.



The certificate must be posted before it can be issued to its holders and additional interests.

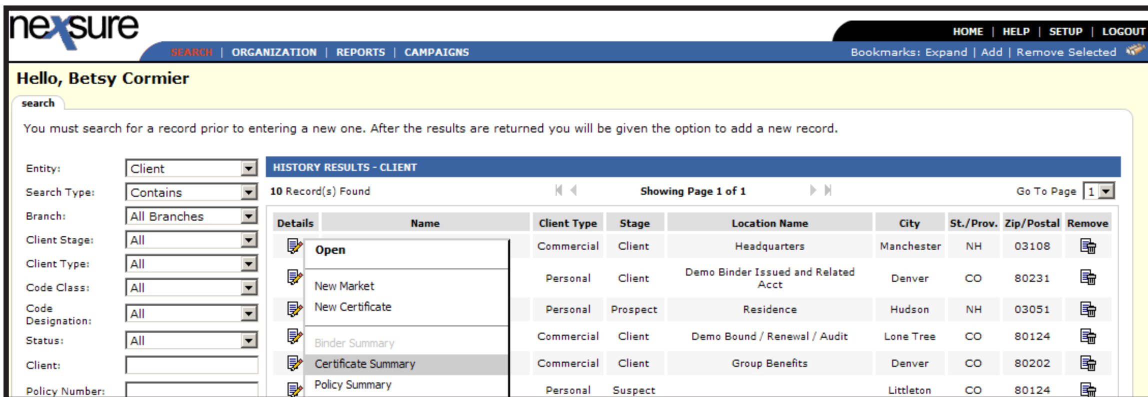
Posting and Issuing a Certificate

Posting a certificate will lock down all information entered on the certificate form. New certificate holders and additional interests may be added to the form but the form itself cannot be changed. Once the certificate form is posted, it may be issued to its certificate holders and additional interests.

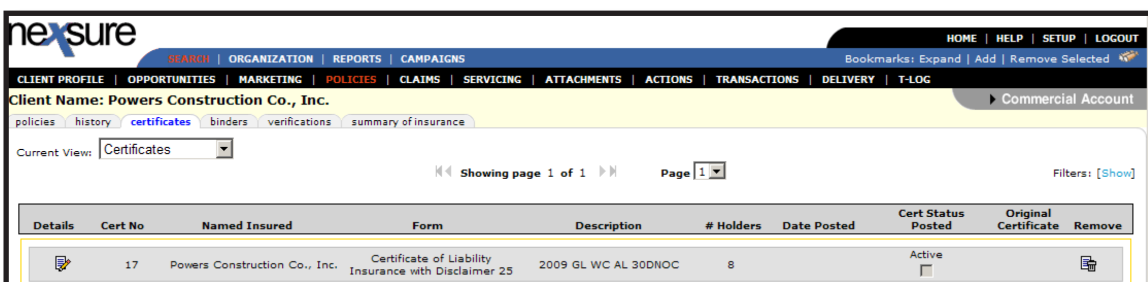
HOW to Post a New Certificate

If you are not already in the certificate to be posted, locate the Client's **certificate summary** from either Client **SEARCH** or the **POLICIES** link on the **Client** menu.

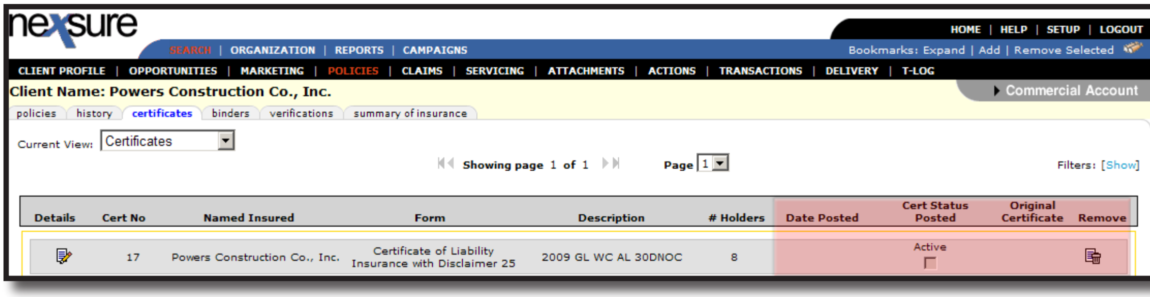
- From **SEARCH** on the **Primary** menu, right click on the Client's **Details** icon and select **Certificate Summary** from the options to display the **certificates** tab.



- After locating the appropriate client through **SEARCH**, click the **POLICIES** link on the **Client** menu. Click the **certificates** tab.



The **certificates** tab displays the default view of all **Certificates** with an **Active** status. Use the filter's **[Show]** link to search for all certificates with a **Posted** status of **No** to display only un-posted certificates. Certificates that are not posted display with an active **Remove** icon, no **Date Posted** and the **Posted** check box is unchecked. For more information, see "HOW to Use the Certificates Tab Summary View" later in this Chapter.

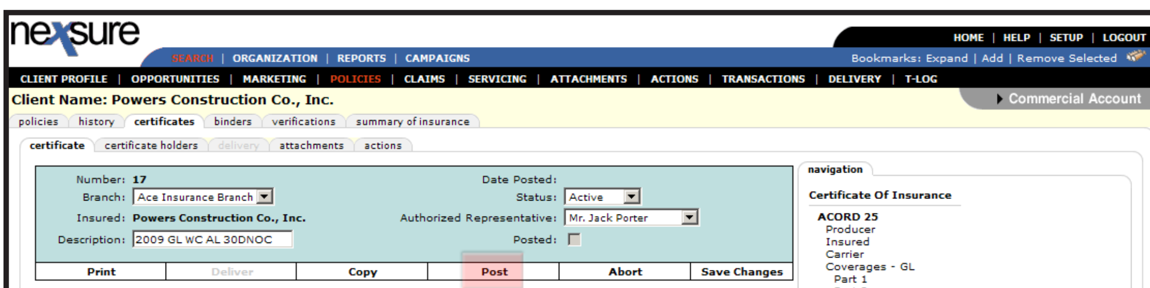


From the **Certificates** view, click the **Details** icon of the certificate to be posted. Always preview the certificate to verify the information represented is accurate prior to posting the form. Once posted, information on the form cannot be altered.

- If the certificate does not have any holders added the **Print** link in the navigation toolbar under the certificate header will generate a preview of the form. If holders have been added, use the **View Cert** icon for a holder under the certificate holders tab to preview the cert. **View Cert** from the **certificate holders** tab will generate a preview of the form that includes holder information.
- If information on the form needs to be changed prior to posting, see “HOW to Populate a New Certificate Form” earlier in this Chapter.

When the accuracy of the certificate form is verified you are ready to post the form.

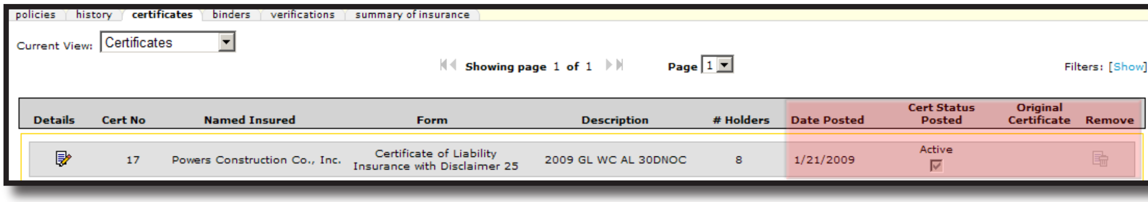
Click the **Post** link in the **navigation toolbar** under the certificate header to lock down the certificate form.



Note: After a certificate is posted it cannot be **Aborted** or **Removed**. For information on aborting certificates, see “HOW to Remove/Abort a Certificate” later in this Chapter.

A confirmation dialog box will display. Click **OK** to post the certificate. The certificate header changes to a dark teal color. Certificate header input fields are locked down with the exception of the **Status** which may be changed as the status of the certificate changes. The header reflects the **Date Posted** and the **Posted** check box is checked. **Default Special Instructions**, **Coverage Summary** and form in the **Navigation** tab are all locked down providing a permanent record of the form that will be issued to its holders and additional interests.

The certificate now displays on the **Certificate Summary** with a **Date Posted**, a check mark in the **Posted** check box and an inactive **Remove** icon.



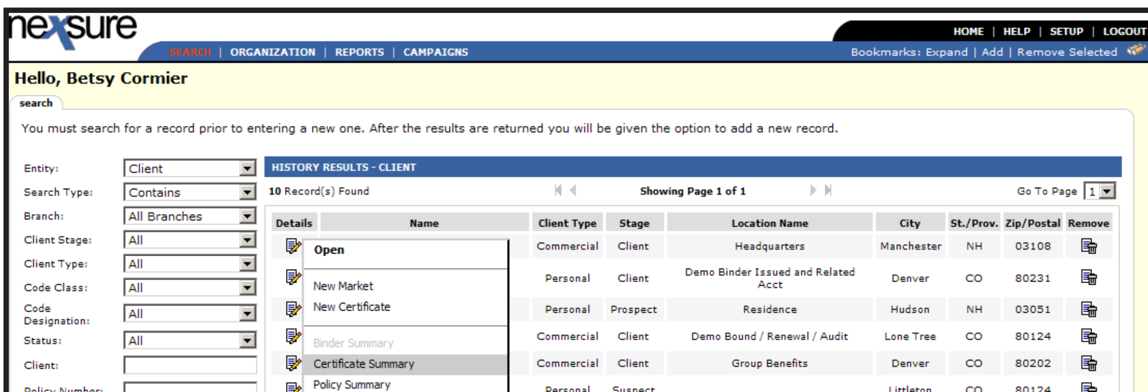
When the certificate is posted, you are ready to issue the certificate to its holders.

HOW to Issue a Certificate from the Certificate Holders Tab

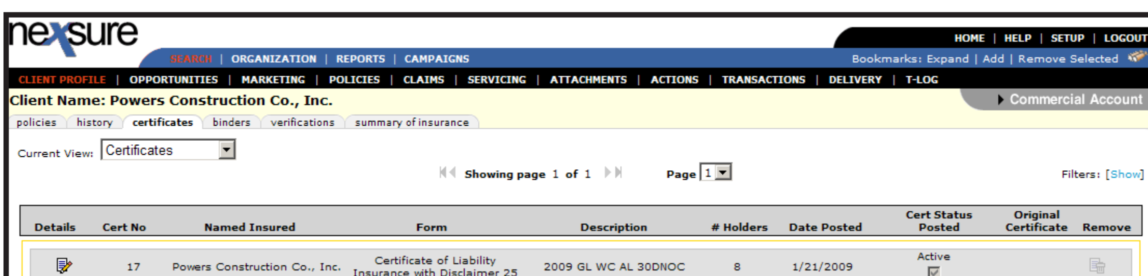
Once a certificate is posted, the certificate holders must be issued in order to print or deliver the certificate to the holder. Issuing a holder locks down the holder/additional interest information providing a permanent record of the holder's certificate. Prior to issuing certificates, verify the accuracy of holder information. If changes need to be made, see "HOW to Modify Certificate Holders" earlier in this Chapter. Once issued, only the **Reference** text and **Active/Inactive** status of a holder may be altered.

If you are not already in the certificate, locate the client's **certificate summary** from either client **SEARCH** or the **POLICIES** link on the **Client** menu.

- From **SEARCH** on the **Primary** menu, right click on the client's **Details** icon and select **Certificate Summary** from the options to display the **Certificate Summary**.



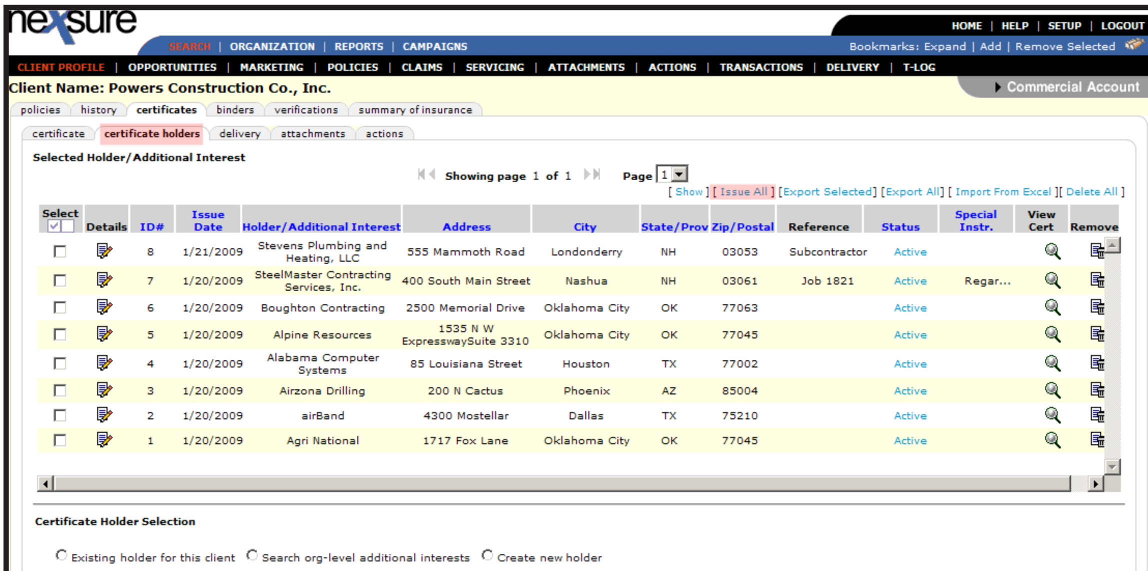
- After locating the client through **SEARCH**, click the **POLICIES** link on the **Client** menu. Click the **certificates** tab to display the **Certificate Summary**.



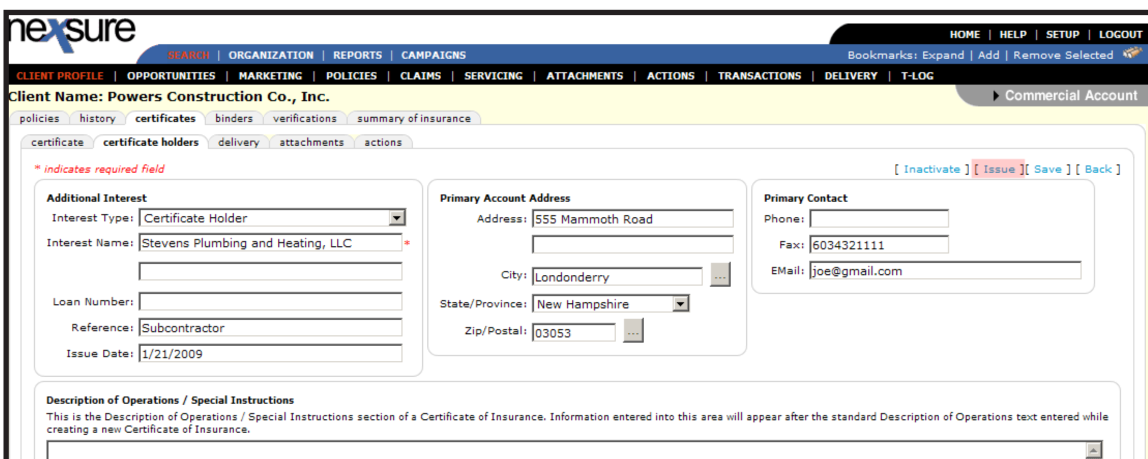
- Click the **Details** icon next to the posted certificate.

- Click the **certificate holders** tab.
- Holders may be issued their certificates all at once or individually from holder details.
- To issue all holders at once, click the **[Issue All]** link. **[Issue All]** issues all un-issued holders added to the certificate that have an **Active** status. A confirmation dialog box displays. Click **OK** to issue all holders. Un-issued holders with an **Inactive** status are not issued using **[Issue All]** from the **certificate holder** tab summary view.

Note: The **[Issue All]** link does not display until the certificate form is posted. Holders may only be issued a posted certificate. If the **[Issue All]** link is not available, click the **certificate** tab and **Post** the certificate. For instructions, see “HOW to Post a New Certificate” earlier in this Chapter.



- To issue to a single holder, click the **Details** icon for the holder from the **certificate holders** tab or add a new holder.



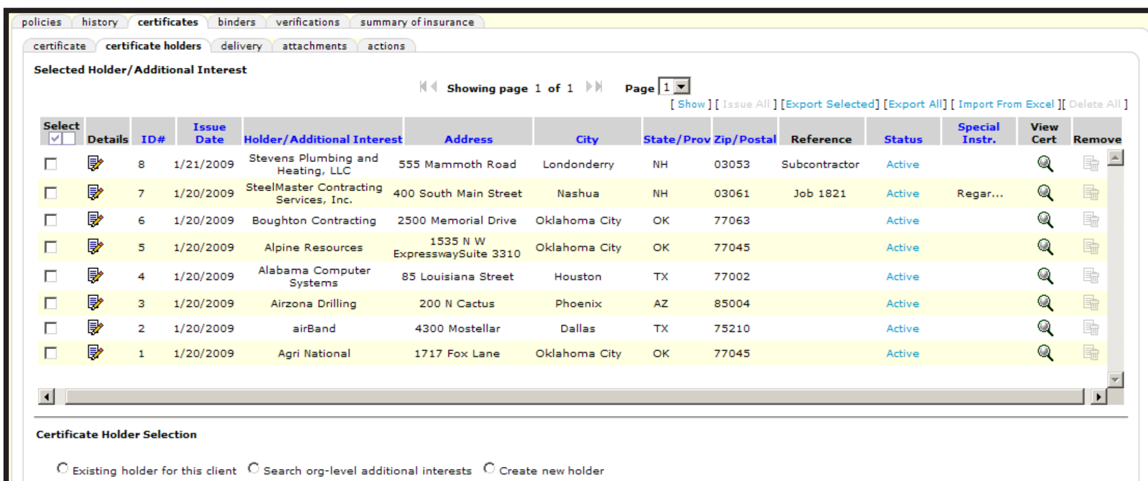
- In the certificate holders detail screen, click **[Issue]**. A confirmation is displayed.

Note: The **[Issue]** link is only available on holders added to posted certificates.

- Click OK.

Note: The **Remove** icon is not available for certificates that have been posted and is not available for certificate holders that have been issued.

The **certificate holders** tab lists all issued holders with an inactive **Remove** icon. The **[Delete All]** link is also inactive. Holders that have been issued certificates cannot be deleted.



Select	Details	ID#	Issue Date	Holder/Additional Interest	Address	City	State/Prov	Zip/Postal	Reference	Status	Special Instr.	View Cert	Remove
		8	1/21/2009	Stevens Plumbing and Heating, LLC	555 Mammoth Road	Londonderry	NH	03053	Subcontractor	Active			
		7	1/20/2009	SteelMaster Contracting Services, Inc.	400 South Main Street	Nashua	NH	03061	Job 1821	Active	Regar...		
		6	1/20/2009	Boughton Contracting	2500 Memorial Drive	Oklahoma City	OK	77063		Active			
		5	1/20/2009	Alpine Resources	1535 N W ExpresswaySuite 3310	Oklahoma City	OK	77045		Active			
		4	1/20/2009	Alabama Computer Systems	85 Louisiana Street	Houston	TX	77002		Active			
		3	1/20/2009	Airzona Drilling	200 N Cactus	Phoenix	AZ	85004		Active			
		2	1/20/2009	airBand	4300 Mostellar	Dallas	TX	75210		Active			
		1	1/20/2009	Agri National	1717 Fox Lane	Oklahoma City	OK	77045		Active			

Certificates for issued holders may be printed and/or delivered.

Printing Certificates

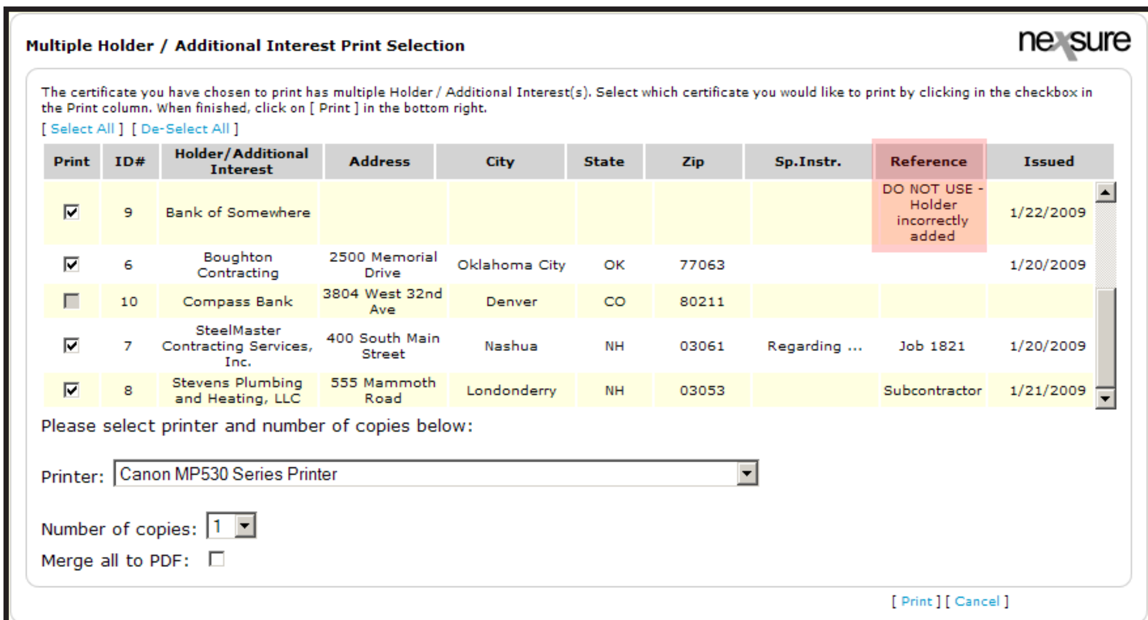
Certificates can be printed only after the certificate is posted and issued to the holder. Certificates can be batch printed from the **certificate** and also from the **certificate tab summary view**.

HOW to Print from the Certificate

If you are not already in the certificate to be printed locate the client's **certificate summary** from either client **SEARCH** or the **POLICIES** link on the **Client** menu. From client **SEARCH**, right click the client's **Details** icon and select **certificate summary**. From the **POLICIES** link, click the **certificates** tab.

- All active certificates that fall within the search filter criteria will be displayed.

- If a certificate is not displayed, click the filter's **[Show]** link located in the upper right corner of the screen, change the search criteria and click the **Search** button to display new search results.
- Each certificate will have its own **Details** icon. Click the **Details** icon of the certificate to be printed.
- Click the **Print** link in the navigation toolbar under the certificate header.
- Click the **Select** check box to the left of the certificate holder you wish to print, or click the **Select** all check mark to batch print all of the selected certificate holders. The holders are listed in alphabetical order and will print in the same order. Click the empty **Select** check box to clear the selected certificate holders.
- Use caution when using **Select All** option. All **Issued** holders, including holders that are **Inactive**, are listed and available for selection. Holders that have not been Issued a certificate are listed with an inactive select check box and may not be selected to print. To avoid inadvertently printing an **Inactivated** holder, use the **Reference** text box to identify the reason the holder has been **Inactivated**. The **Reference** is displayed on the print selection screen providing a visual indicator of an inactive holder.


Multiple Holder / Additional Interest Print Selection

The certificate you have chosen to print has multiple Holder / Additional Interest(s). Select which certificate you would like to print by clicking in the checkbox in the Print column. When finished, click on [Print] in the bottom right.

[Select All] [De-Select All]

Print	ID#	Holder/Additional Interest	Address	City	State	Zip	Sp.Instr.	Reference	Issued
☑	9	Bank of Somewhere						DO NOT USE - Holder incorrectly added	1/22/2009
☑	6	Boughton Contracting	2500 Memorial Drive	Oklahoma City	OK	77063			1/20/2009
☐	10	Compass Bank	3804 West 32nd Ave	Denver	CO	80211			
☑	7	SteelMaster Contracting Services, Inc.	400 South Main Street	Nashua	NH	03061	Regarding ...	Job 1821	1/20/2009
☑	8	Stevens Plumbing and Heating, LLC	555 Mammoth Road	Londonderry	NH	03053		Subcontractor	1/21/2009

Please select printer and number of copies below:

Printer: Canon MP530 Series Printer

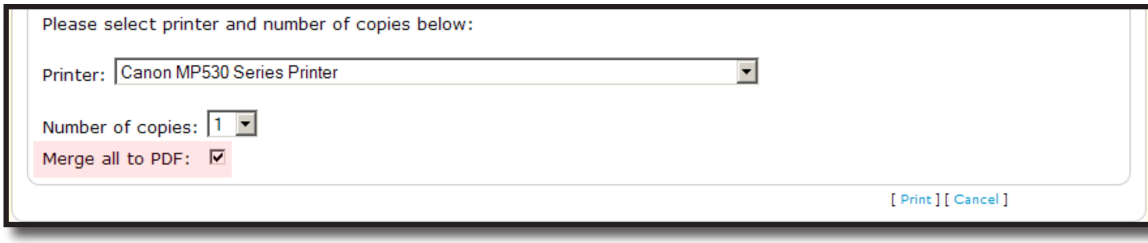
Number of copies: 1

Merge all to PDF: ☐

[Print] [Cancel]

Note: Use the **certificates** tab **Certificate Holders** view to filter the list of Certificate Holders by **Active** status or **Date Issued**. The search results may be selected and printed. For instructions, see "HOW to Print in Summary View" later in this Chapter.

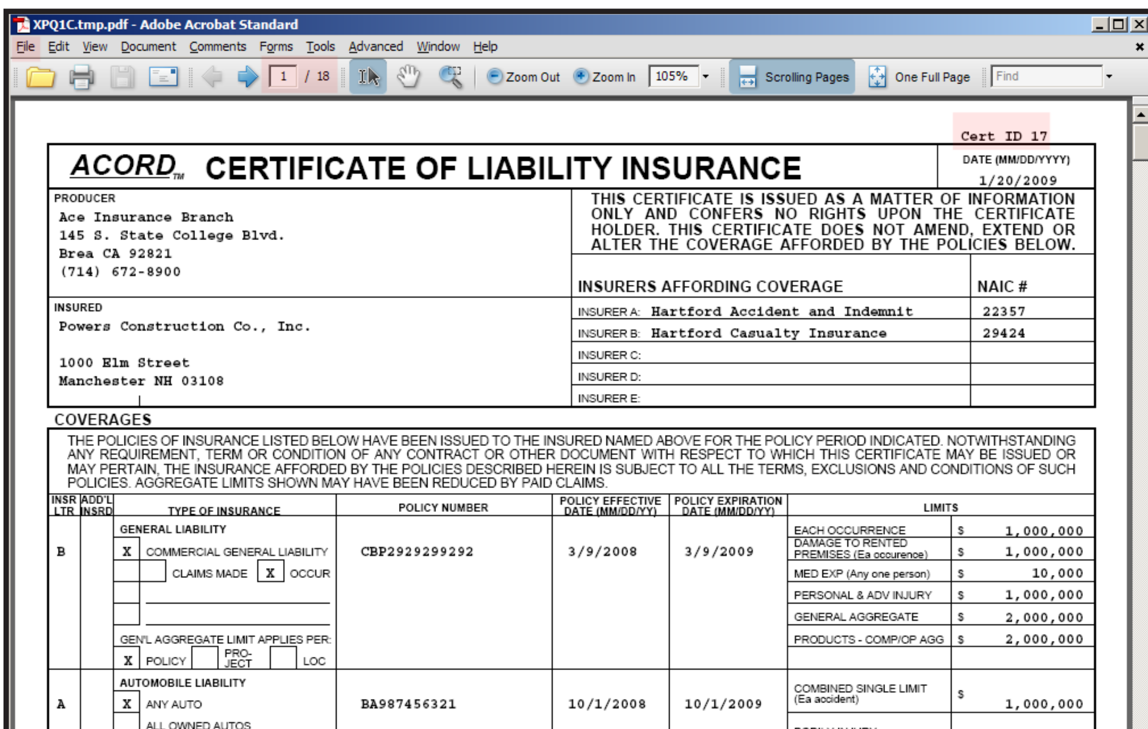
- Select the **Printer** and the **Number of Copies** needed. Select **Merge all to PDF** to incorporate all selected certificate holders' certificates into a single PDF file. Click the **[Print]** link. The copies will be sent to the printer selected or to a PDF if **Merge all to PDF** was selected. Click **[Cancel]** to cancel the print job.



A **Successfully sent new print batch request** message displays on the print dialog box. The print dialog box remains open to make additional selections for printing. Click **[Cancel]** to return to the **certificate** when printing is complete.

Certificates print with the **Cert ID** number displayed on the upper right corner. The date displayed on each certificate is the **Issue Date** on the certificate holder's record. Disclaimer wording on the reverse side of **ACORD 25** prints on a second page for each holder.

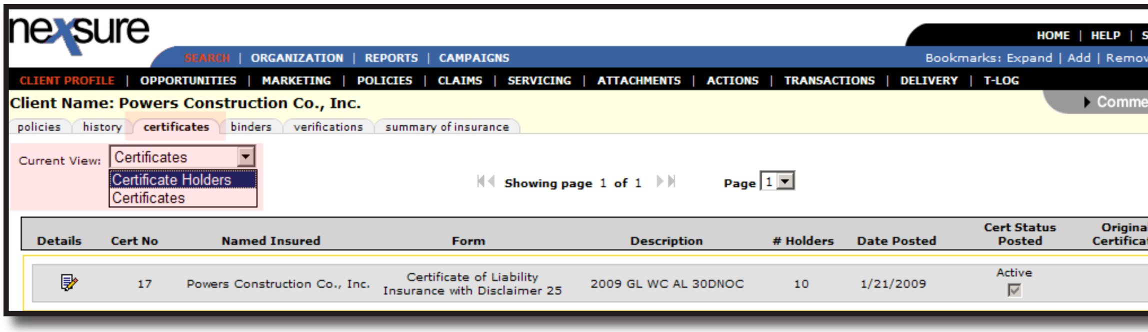
If the option to **Merge all to PDF** is selected, the certificates will be compiled into one multi-page PDF that will display on your screen. Click the **Printer** icon to print the document. Use the PDF **File** menu to save a copy to attach for documentation and delivery via Nexsure.



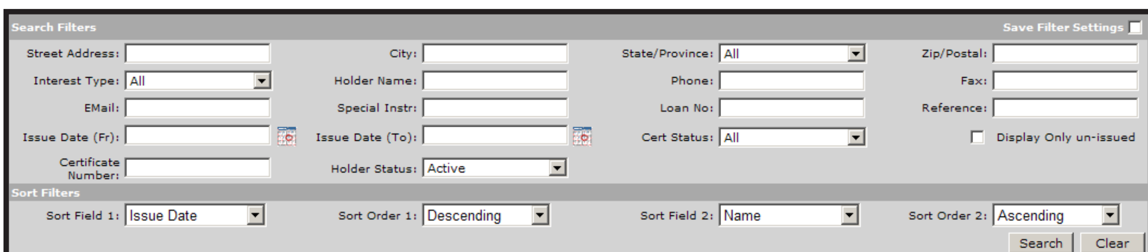
HOW to Print in Summary View

If you are not already in the certificate to be printed, locate the client's **certificates** tab from either client **SEARCH** or the **POLICIES** link on the **Client** menu. From Client **SEARCH** right click the client's **Details** icon and select **Certificate Summary** option. From the **POLICIES** link, click the **certificates** tab.

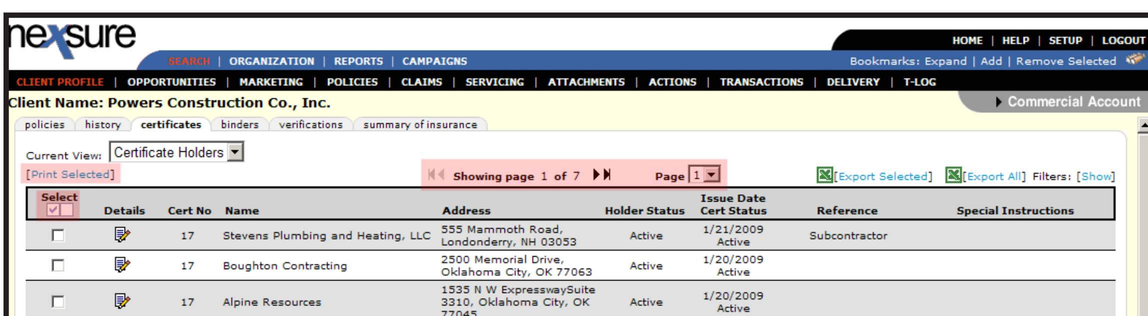
- The certificates tab displays all certificates that fall within the default filter search criteria.



- Select **Certificate Holders** in the **Current View** list.
- All certificate holders which fall within the search filter criteria will be displayed. To display only the certificates to be printed, click the filter **[Show]** link to search for issued holders by their **Certificate Number**, **Holder Status**, **Issue Date**, etc.



- Click the **Select** check box to the left of the certificate holder you wish to print, or click the **Select All** check box to select all of the listed certificate holders to print. The **Select** all option selects all holders on the currently displayed page. If search results are listed on multiple pages, navigate to each page and click the **Select all** option on each page to select all certificates that meet your search criteria for printing.



- Click the empty **Select** check box to clear the selection of all certificate holders on the displayed page. Be certain to clear all selections on any additional pages if necessary.
- Click the **Print Selected** link when all certificates to be printed are selected.
- The **Batch Print** dialog box displays. Select the **Printer** and the **Number of Copies**. Select **Merge all to PDF** to incorporate all selected certificate holders' certificates into a single PDF file. Click the **[Print]** link. The copies will be sent to the printer selected or to a PDF if **Merge all to PDF** was selected. Click **[Cancel]** to cancel the print job.

Notes

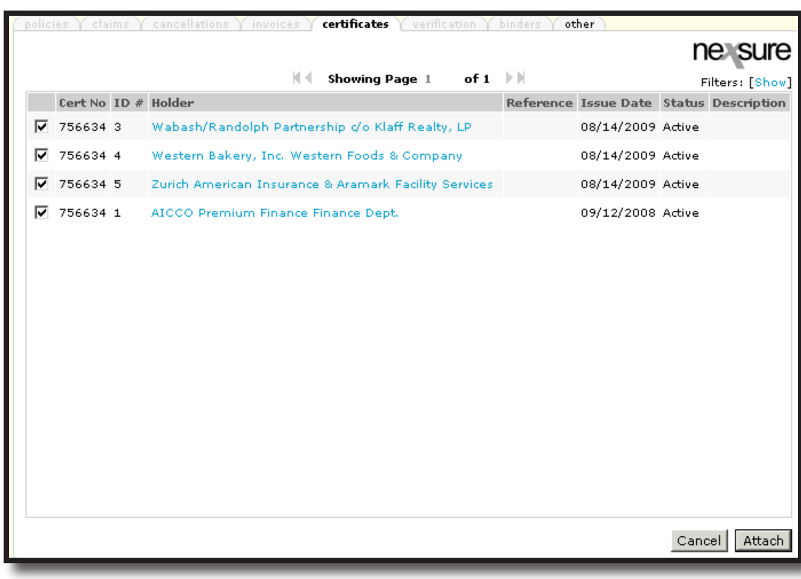
Delivering a Certificate

The certificate to be delivered can be accessed and delivered from Nexsure in one of two ways.

Note: The certificate must be posted and the holder issued to e-mail or fax it from Nexsure.

HOW to Deliver the Certificate Using the Deliver Link in the Certificate

- If you are not already in the certificate to be printed, locate the client's **certificates** tab from either Client **SEARCH** or the **POLICIES** link on the **Client** menu. From client **SEARCH** right click the client's **Details** icon and select **Certificate Summary** option. From the **POLICIES** link, click the **certificates** tab. Click the **Details** icon of the certificate to be delivered.
- Click the **Deliver** link in the navigation toolbar under the certificate header.
- The certificate's **delivery** tab is displayed. The certificate can be sent from Nexsure as an **E-mail** or **Fax**. The **e-mail** tab will default, if faxing the certificate click on the **fax** tab.
- Complete the required e-mail or fax information on the left side of the screen.
- The right side of the delivery screen is used to attach forms and documents. Click the **Add** link on the gray **Certificates** line.
- The Attachment dialog box **certificates** tab will be displayed.
- All issued certificates are listed for any holder with an active status. The holder's **ID#**, **Name**, **Reference** and **Issue Date** are displayed. The certificate's **Status** and **Description** are also shown. The **[Show]** link is available to search for certain holders. Click the **Holder Name** hyperlink to view the form that will be delivered if there is any question you are attaching the correct certificate for delivery.
- Click the appropriate **check box** of the **Certificate** to be delivered. Multiple selections may be made.



- Click the **Attach** button to attach each selected **Holder's** certificate. Click **Cancel** to abort.
- The attachment(s) will display, with the total number of items attached, on the right side of the delivery screen.
- Each selected certificate is a separate attachment.
- Click the Add link on the gray Others line to attach documents that are found under the certificate's attachments tab.
    - Documents attached at **Client** level or to other certificates will not be available for selection at the certificate level. If it is necessary to include documents attached elsewhere within the client in the delivery, click the **[Save Draft]** link. Re-open the saved draft at **Client** level **DELIVERY**. Search for deliveries with a **Status** of **Draft**. Click the **Details** icon of the draft and continue.
- Click the **Send** link to send the e-mail or fax.
- The **Delivery** summary view screen is displayed with the stage of the e-mail or fax. The stage will update as the screen is refreshed.
- If the e-mail is unsuccessful, the sender will receive an **unsuccessful e-mail** message in their mailbox. If the fax failed, the sender will receive a **Delivery Failure Notification** e-mail message in their mailbox.
- Each delivery will have its own **Details** icon. To view the details, perform the following steps:
    - Click the **Details** icon to display the e-mail or fax information, the forms included, and the total number of attachments.
    - Click the **viewer** tab and each form included in the e-mail or fax is displayed with a **Magnifying Glass** icon.
    - Click the **Magnifying Glass** icon to view the information contained in the form that was sent.
- The Delivery Summary View screen can be accessed from the **Home** menu or **Client** menu. The **Home** menu will display a summary of all deliveries sent by the user. The client level will only display deliveries for the specified client.

HOW to Deliver the Certificate Using the Delivery Link on the Client Menu

- Locate the appropriate client through **SEARCH** and click the **DELIVERY** link on the **Client** menu.
    - Defaults configured in the **[Show]** filters option will determine what is displayed in the summary view when clicking the **DELIVERY** link.
- Click the **[Add New]** link.
- The certificate can be sent from Nexsure as an **e-mail** or **fax**. The **e-mail** tab will default, if faxing the certificate click on the **fax** tab.
- Complete the required e-mail or fax information on the left side of the screen.
- The right side of the delivery screen is used to attach forms and documents to the e-mail or fax. Click the **Add** link in the gray **Certificates** line.
- The Attachment dialog box **certificates** tab will appear.
- All issued certificates are listed by **Cert No**. The holder's **ID#**, **Name**, **Reference** and **Issue Date** are displayed. The certificate's **Status** and **Description** are also shown. The **[Show]** link is available to search for certain holders. Click the **Holder Name** hyperlink to view the form that will be delivered if there is any question you are attaching the correct certificate for delivery.
- Click the appropriate **check box** of the certificate to be delivered. Multiple selections may be made.
- Click the **Attach** button to attach all selected holders' certificates. Click **Cancel** to abort.
- The attachment(s) will display, with the total number of items attached, on the right side of the delivery screen. Each selected certificate is a separate attachment.
- Click the **Add** link on the gray **Others** line to attach documents that are found under the client's **ATTACHMENTS**.
- Click the **Send** link to send the e-mail or fax.
- The Delivery Summary View screen is displayed with the stage of the e-mail or fax. The stage will update as the screen is refreshed.
- If the e-mail is unsuccessful, the sender will receive an **unsuccessful e-mail** message in their outlook mailbox.
- Each delivery will have its own **Details** icon. To view the details, perform the following steps:
    - Click the **Details** icon to display the e-mail or fax information, the forms included, and the total number of attachments.
    - Click the **viewer** tab and each form included in the e-mail or fax is displayed with a **Magnifying Glass** icon.
    - Click the **Magnifying Glass** icon to view the information contained in the form that was sent.
- The Delivery Summary View screen can be accessed from the **Home** menu or **Client** menu. The **Home** menu will display a summary of all deliveries sent by the user. The client level will only display deliveries for the specified client.

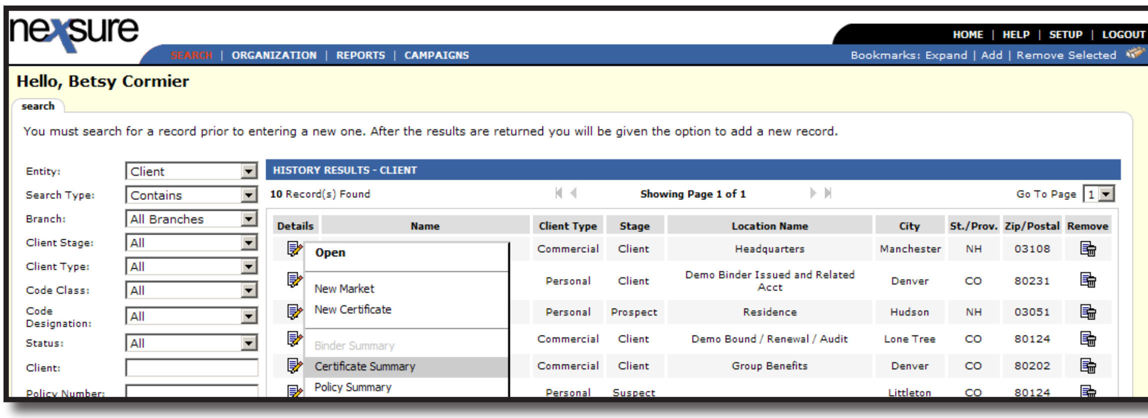
Certificates Tab Summary Views

HOW to Use the Certificates Tab Summary View

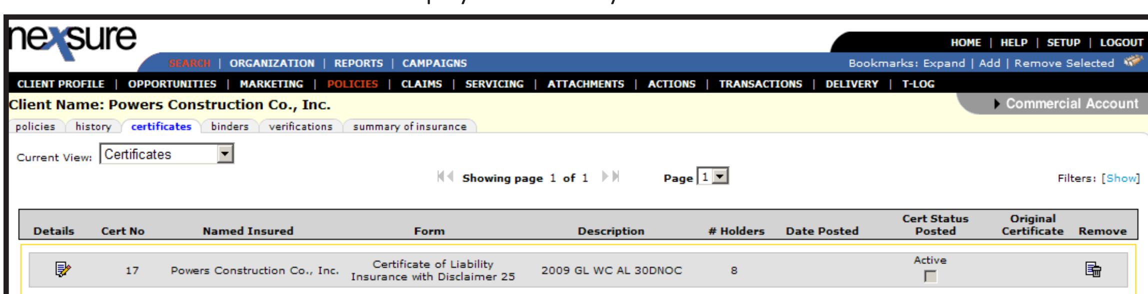
The **certificates** tab offers two summary views of the client's certificates. Understanding the certificate summary views is useful for maintaining certificates and their holders. The summary view will give you pertinent information regarding the certificates depending on the **Current View** selected. The **Current View** list, displayed in the upper left corner of the **certificates** tab, determines what is displayed in the **certificates** tab summary view.

Locate the client's **certificates** tab from either client **SEARCH** or the **POLICIES** link on the **Client** menu.

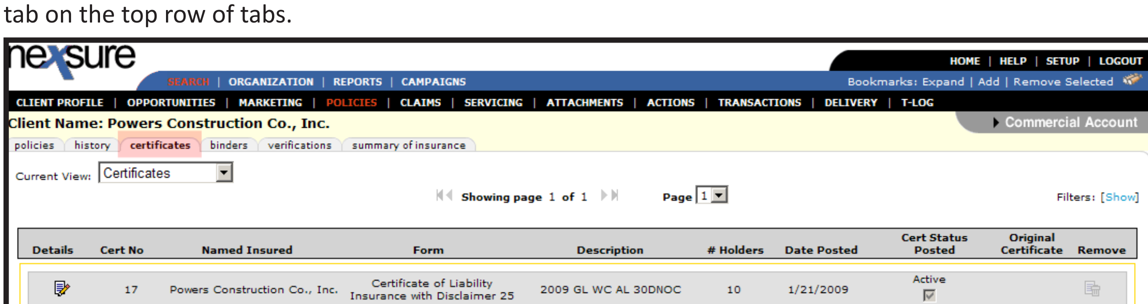
- From **SEARCH** on the **Primary** menu, right click on the client's **Details** icon and select **Certificate Summary** from the options to display the **certificates** tab summary views.



- After locating the appropriate client through **SEARCH**, click the **POLICIES** link on the **Client** menu. Click the **certificates** tab to display the summary views.



When working in certificates, navigate back to the certificates summary screen by clicking the **certificates** tab on the top row of tabs.



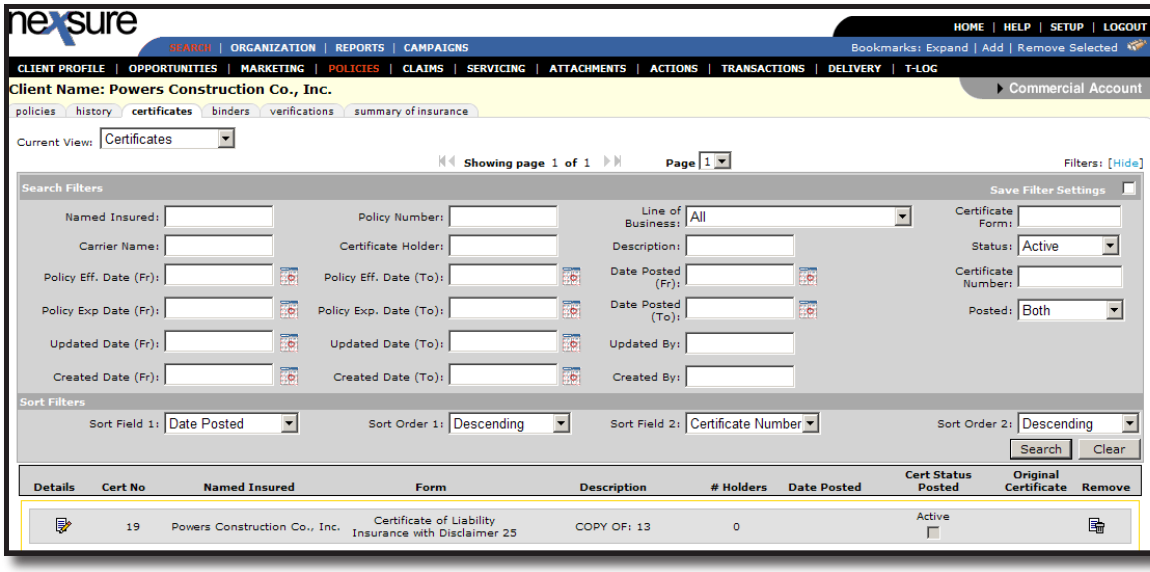
WHAT is Displayed when Current View = Certificates

The default **certificates** tab summary view of **Certificates** lists all certificates with an **Active** status. All certificates meeting the search filter criteria are displayed and identified with a **yellow border**.

Column Header	Description
Details	Clicking the Details icon of the certificate, displays the certificate tab along with the appropriate form.
Cert No	The Certificate Number is generated by Nexsure and is unique to each certificate in Nexsure.
Named Insured	The Named Insured selected when the certificate was added
Form	The ACORD Certificate type and Form Number
Description	If a Description was entered for the certificate in the header it will be displayed. Descriptions are optional and can be used for job numbers, certificate descriptions, etc. The Description is used for internal notes and does not appear on the certificate form.
# Holders	The number of active and inactive holders added to the certificate.
Date Posted	If the certificate has been Posted the date of posting will be displayed.
Cert Status / Posted	The Status of the certificate as saved in the certificate header is displayed. The status can be changed after the certificate is posted. A check mark in the Posted check box indicates the certificate has been posted.
Original Certificate	Renewing a certificate will generate a new Certificate Number. The Original Certificate number is displayed on the renewed certificate.
Remove	Posted certificates display with an inactive Remove icon. A certificate that has not been posted displays with an active Remove icon.

If there are no results to display based on the Search Filter criteria, the **Search Filters** will show by default.

Clicking the filter's **[Show]** link displays the search criteria defaults set by Nexsure or specified by the user. The certificates displayed are based on the defaults setup in this filter. The filter can be saved according to the user's specifications by entering the desired search criteria, placing a check mark in the **Save Filter Settings** check box and clicking the **Search** button. Use caution when searching for holders using date criteria. Any dates entered are saved with all other search criteria when the filter settings are saved.



Note: To clear user specified Filter Settings, deselect the **Save Filter Settings** check box and click the **Search** button. The next time the certificates tab **Certificates Summary View** is accessed, Nexsure default filter settings will determine what is displayed on the summary.

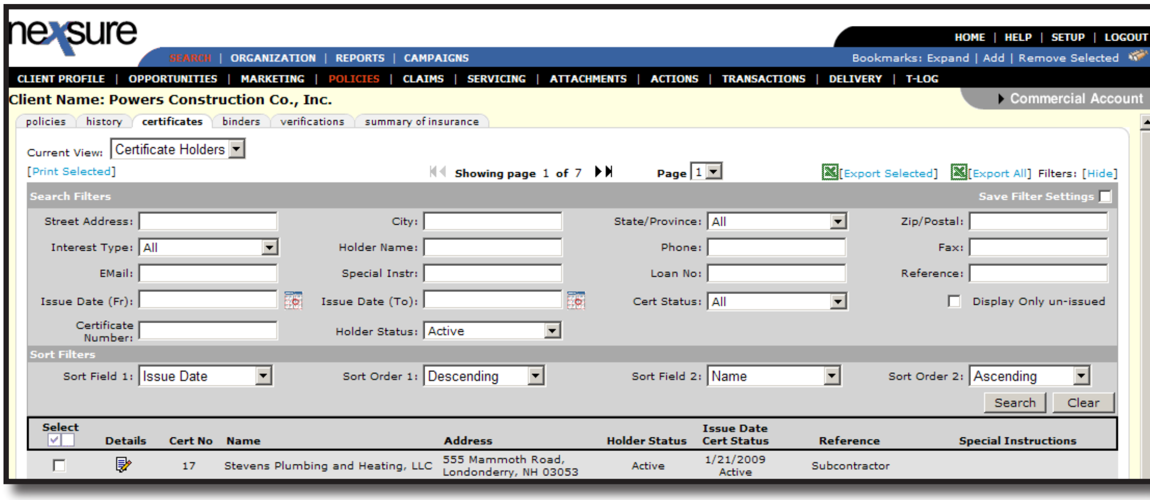
WHAT is Displayed when Current View = Certificate Holders

The default **certificates** tab summary view of **Certificate Holders** lists certificates by their certificate holders with an **Active** status. All certificate holders which fall within the search filter criteria are displayed.

Column Header	Description
Select	Click the check mark to Select all holders on the displayed page. Click the empty check box to de-Sele ct all holders on the displayed page. Select holders to [Print Selected] or [Export Selected].
Details	Clicking the Details icon of the holder, opens the certificate and displays the certificate tab. Only the Reference box of an Issued holder may be edited.
Cert No	The Certificate Number is generated by Nexsure and is unique to each certificate in Nexsure.
Name	Name entered in Interest Name fields of the holder's details.
Address	The certificate holder's address information is displayed.
Holder Status	The default view displays only holders with a Status of Active. Use the [Show] link to search for and display all holders or only those with an Inactive status.
Issued Date / Cert Status	Issue Date displays date the holder was added to the certificate and Issued. Un-issued holders display with a blank date field. Cert Status identifies the status of the holder's certificate. Statuses include Active, Inactive, Cancelled or Renewing. Default search results display all certificate statuses.
Reference	Any Reference added to certificate holders is displayed. References are internal notes and do not appear on the holder's certificate.
Special Instructions	Any Description of Operations/Special Instructions added to a certificate holder will display.

If there are no results to display based on the **Search Filter** criteria, the **Search Filters** will show by default.

Clicking the filter's **[Show]** link displays the search criteria defaults set by Nexsure or specified by the user. The certificate holders displayed are based on the defaults setup in this filter. The filter can be saved according to the user's specifications by entering the desired search criteria, placing a check mark in the **Save Filter Settings** check box and clicking the **Search** button. Use caution when searching for holders using date criteria. Any dates entered are saved with all other search criteria when the filter settings are saved.



For information on **[Print Selected]** see to "HOW to Print in Summary View" earlier in this Chapter.

For information on **[Export Selected]** and **[Export All]** see "Exporting and Importing Holders" later in this Chapter.

Notes

Maintaining Certificates

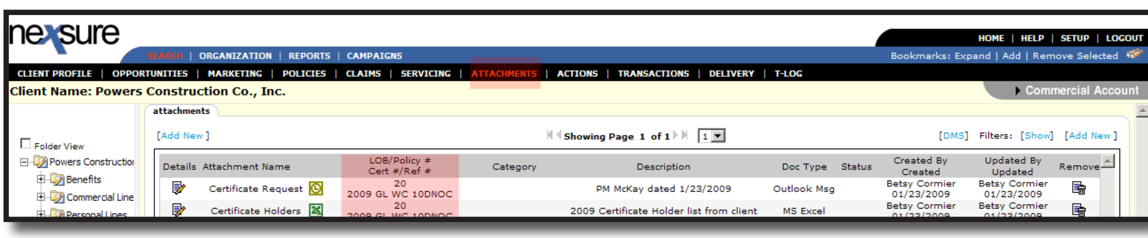
HOW to Remove/Abort a Certificate

A certificate that has not been posted and does not have any associated **actions** may be removed from the client by clicking the **Remove** icon on the **certificates** tab summary view or by clicking the **Abort** link on the Navigation toolbar on the **certificates** tab. The **Remove** icon and the **Abort** link are inactive if a certificate is posted. Employees must be granted security rights to delete certificates.

Aborting a certificate will also remove any certificate holders and attachments added to the certificate. Before removing or aborting a new certificate, verify any attachments that may be associated to the certificate.

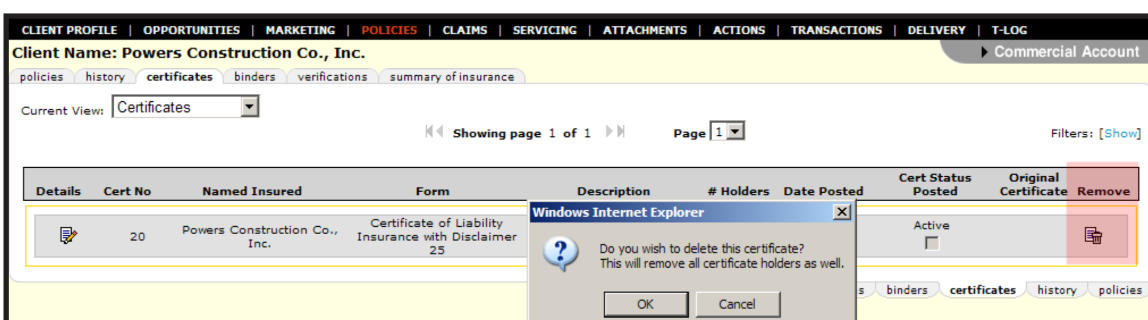
- Click the **attachments** tab to view attachments associated to the certificate.

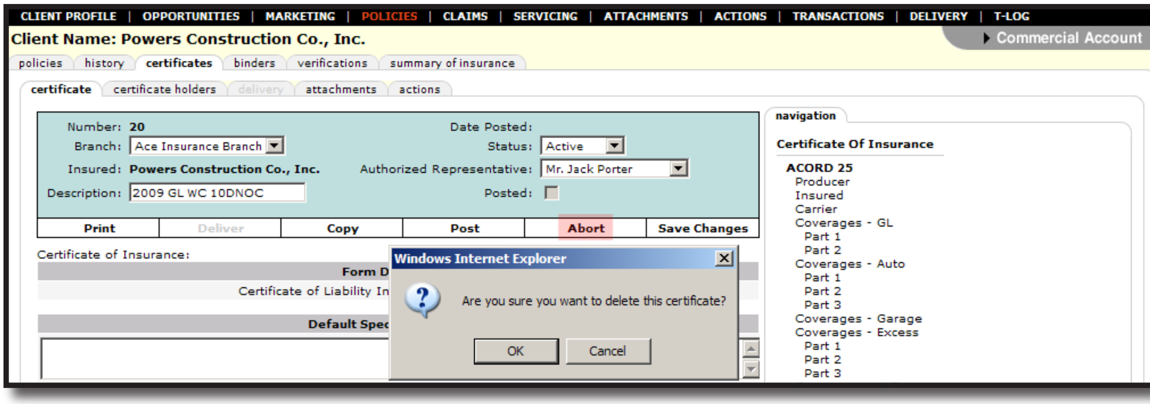
- Attachments added at **Client** menu **ATTACHMENTS** and associated to the certificate are included in the **attachments** tab view and will be deleted when the certificate is aborted or removed.



Note: Aborting a certificate aborts any new holders added to the certificate. Abort does not remove the source certificate holder or additional interest when they are added to the new certificate using **Existing holder for this client** or **Search org-level additional interests** options.

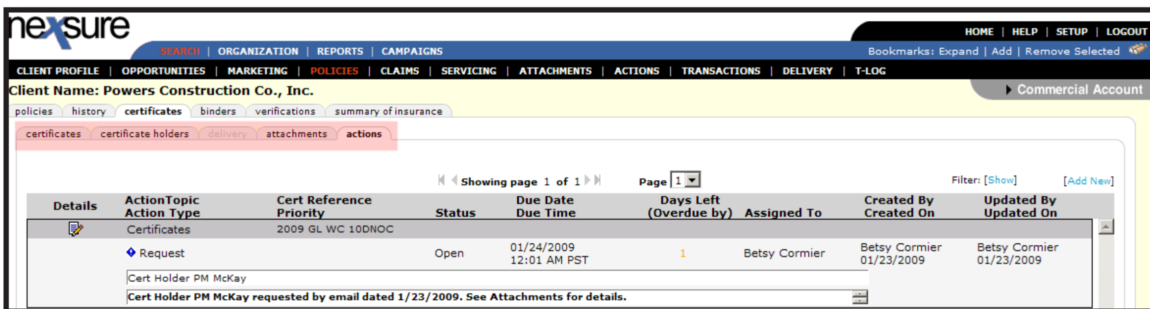
After clicking the **Remove** icon or **Abort** link, an alert message displays. Click **OK** to continue and remove/abort the certificate and its holders or click **Cancel** to keep the un-posted certificate.



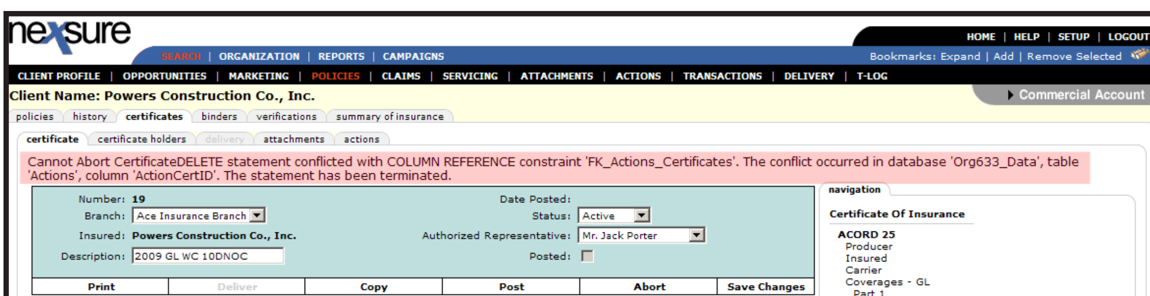


Certificates with associated **Actions** cannot be deleted. Actions associated to the certificate display on the **actions** tab at certificate level.

- Click the **actions** tab to view any actions associated to the certificate.



- After clicking **OK** to confirm deletion of certificate, a “Cannot Abort Certificate” system message displays above the certificate header. If deleted from the **certificates tab summary view**, a System Error message will display terminating removal of the certificate.

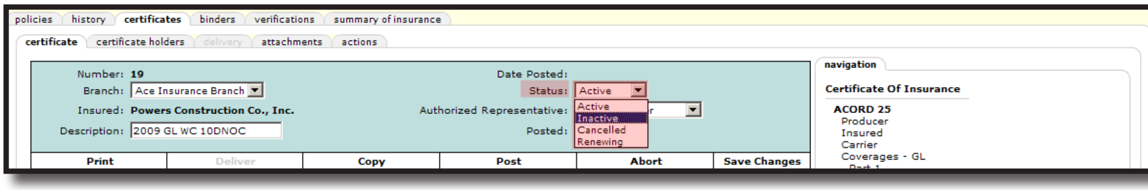


If the certificate cannot be deleted but should not be used, change the certificate’s **Status**.

HOW to Change Certificate Status

A certificate's **Status** displays in the **certificates tab summary view**. The certificate **Status** may also be used to filter displayed certificates for selection in **Delivery** and in the **certificate tab certificate holder summary view**. Certificate **Status** can be changed in both posted and un-posted certificates.

- Locate the certificate from client **SEARCH** by selecting **Certificate Summary** on the client **Details** icon right-click menu, or by clicking the **POLICIES** link on the **Client** menu and the **certificates** tab.
- Click the **Details** icon of the certificate to display the **certificate** tab.
- In the certificate header, select the appropriate **Status** from the **Status** drop-down list.



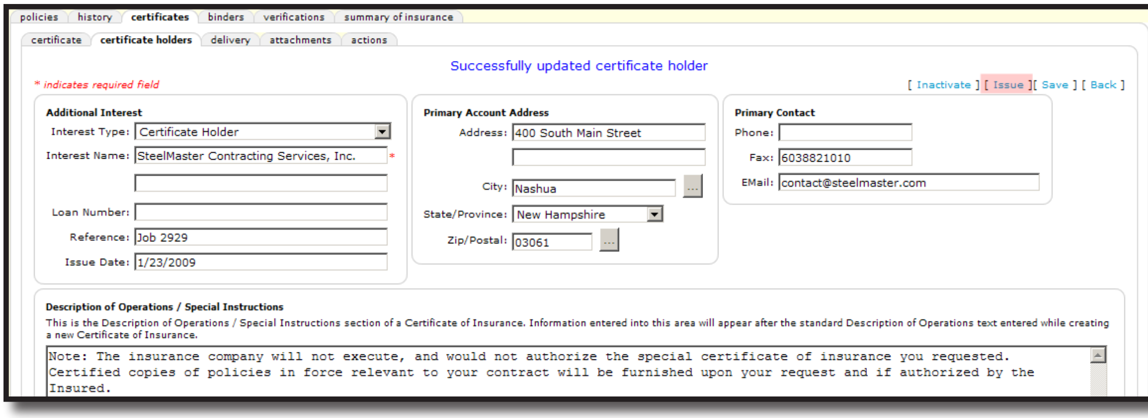
- Click **Save Changes** on the **Navigation** toolbar under the header to save changes.
- A certificate's **Status** can be changed at any time.

New certificate holders can only be added to certificates with a **Status** of **Active** or **Renewing**.

HOW to Add a New Holder to an Existing Certificate

A new holder may be added to an existing **Active** or **Renewing** certificate.

- Locate the certificate from client **SEARCH** by selecting **Certificate Summary** on the client's **Details** icon right-click menu or by clicking the **POLICIES** link on the **Client** menu and the **certificates** tab.
- Click the **Details** icon of the certificate to display the **certificate** tab.
- Click the **certificate holders** tab to add the new holder. For help adding new holders, see "HOW to Add Certificate Holders and Additional Interests" earlier in this Chapter.
- Click the **Details** icon of the newly added holder to edit the certificate holder details if necessary.
  - New holders display in descending order by their **Issue Date**, or the date they are added to the certificate, with an active **Remove** icon.
  - Holders added using the **Create new holder** option are already open for editing.
- Click the **[Save]** link to save changes to the new certificate holder.
- The new holder may be **Issued** within the details or from the **certificate holders** tab summary.
  - To issue the holder from the certificate holder details, click the **[Issue]** link. Click **OK** to issue the new holder.



- To issue the holder from the **certificate holders** tab, click the **[Issue All]** link. Click **OK** to issue the new holder. Only un-issued **Active** holders will be Issued.

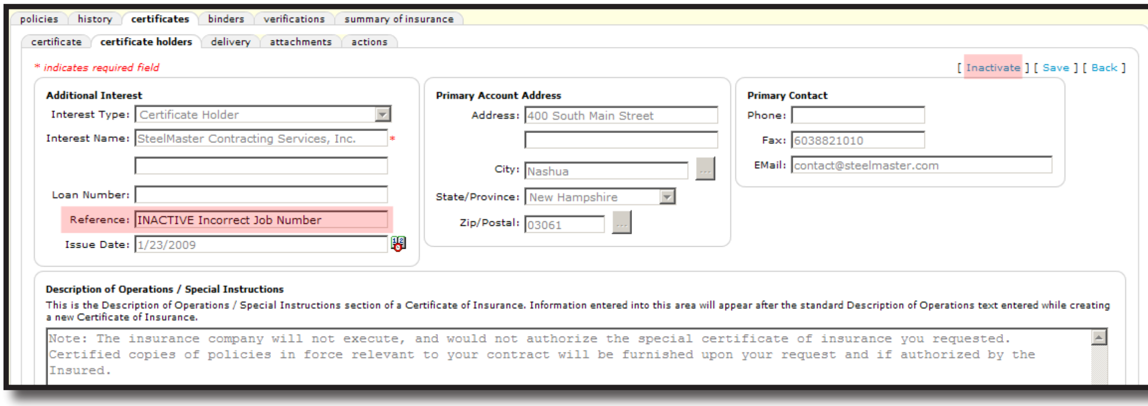
- Print the new certificate from the **certificates** tab **Print** link or from the **certificates** tab **Certificate Holder Summary View**. For help printing certificates, see “Printing Certificates” earlier in this Chapter.
  - Use the **Issue Date** to help locate and select the certificate for printing.
- Deliver the new certificate from the **delivery** tab at certificate level or the **DELIVERY** link on the **Client** menu. For help delivering certificates, see “Delivering a Certificate” earlier in this Chapter.
  - Use the **Issue Date** to help locate and select the certificate for delivery.

HOW to Inactivate a Certificate Holder

A certificate holder’s status is changed to **Inactive** to indicate it is not to be used for future certificates. Holders with an **Inactive** status will not be issued when **[Issue All]** is selected on the **certificate holders** tab. The **[Issue]** link is available to issue an **Inactive** holder from the certificate holder details. If the user has been granted delete rights of the Certificate holder, unissued holders may be removed instead of inactivating.

- Locate the certificate from client **SEARCH** by selecting **Certificate Summary** on the client’s **Details** icon right-click menu or by clicking the **POLICIES** link on the **Client** menu and the **certificates** tab.
- Click the **Details** icon of the certificate to display the **certificate** tab.
- Click the **certificate holders** tab to locate the certificate holder. Click the filter’s **[Show]** link to search for the holder if necessary.
- Click the **Details** icon of the holder.
- Edit the **Reference** text box to indicate why the holder has been inactivated. The **Reference** text box is editable on both Issued and un-Issued holders. The **Reference** text box displays when the holder’s **Status** may not be available such as on exported holder lists.

- Click the **[Inactivate]** hot link to inactivate the holder.



- A "Successfully Inactivated certificate holder" system message displays and the hot link changes to **[Activate]**. Clicking the **[Activate]** hot link re-activates the holder.

- The **Inactive** certificate holder is removed from the **certificate holders** tab and **certificates** tab **Certificate Holders** summary views. Click the filter's **[Show]** link to locate the **Inactive** holder if necessary.

Note: A holder's **Reference** text box and **[Inactivate]**/**[Activate]** hot links are always available for editing even after the holder's certificate has been Issued.

HOW to Correct an Issued Certificate Holder

When a holder's information is issued incorrectly, use the following workflow to quickly issue a corrected certificate to the holder. You will add a new holder using the existing holder; inactivate the incorrect holder; edit to correct then save and Issue the new holder.

- Locate the certificate from client **SEARCH** by selecting **Certificate Summary** on the client's **Details** icon right-click menu or by clicking the **POLICIES** link on the **Client** menu and clicking the **certificates** tab.

- Click the **Details** icon of the certificate to display the **certificate** tab.

- Click the **certificate holders** tab.

- Add a new holder using the **Existing holder for this client** option:
  - Select the holder with the incorrect information.
  - Click the **[Use Selection]** link.

Note: Only **Active** holders are available for selection using the **Existing holder for this client** option. Always create the new holder record before inactivating the incorrect holder record. However, if an existing holder was selected and the address was changed or a new description of operations was added, this will create another version of the holder. This is done so that if you need to inactivate one version, you will not be inactivating the other versions of the holder that may still be in use.

- The newly added holder displays on the **certificate holders** tab summary with the current date as its **Issue Date** and an active **Remove** icon indicating it has not yet been issued. The new holder contains all of the information from its source, the incorrect holder.

- Click the **Details** icon of the incorrect holder and then click the **[Inactivate]** hot link. For help inactivating the holder, see "HOW to Inactivate a Certificate Holder" earlier in this Chapter. Complete this step before issuing the new holder to avoid any confusion between the two holder records.

- Click the **Details** icon of the new holder and edit the holder information as necessary.

- Click the **[Save]** link to update the record.

- Click the **[Issue]** link to issue the corrected holder record. The holder may also be issued by clicking **[Issue All]** from the **certificate holders** tab summary.

- Print the corrected certificate from the **certificates** tab **Print** link or from the **certificates** tab **Certificate Holder Summary View**. For help printing certificates, see "Printing Certificates" earlier in this Chapter.

- Deliver the corrected certificate from the **delivery** tab at certificate level or the **DELIVERY** link on the **Client** menu. For help delivering certificates, see "Delivering a Certificate" earlier in this Chapter.

HOW to Copy a Certificate

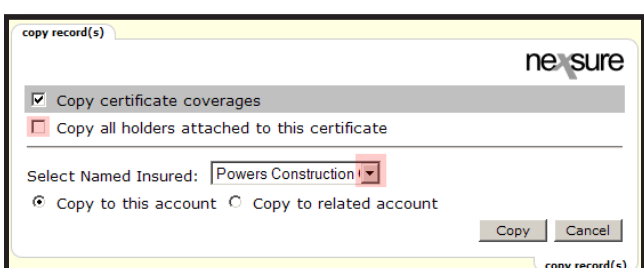
Copy a certificate form and/or its holders to expedite your workflow when you need a copy of the certificate for a different named insured, different cancellation terms, to include or exclude certain lines of business but all other information is the same or perhaps a copy that will be signed by a different authorized representative. Certificates posted with an error but the majority of the information and the holders are otherwise correct can be copied and quickly corrected. You can copy a certificate and/or its holders to a related account.

Note: **Copy** does not copy any attachments or actions from the source certificate. If copied to the new certificate, all certificate holders are copied with a status of **Active**.

- Locate the certificate from client **SEARCH** by selecting **Certificate Summary** on the client's **Details** icon right-click menu or by clicking the **POLICIES** link on the **Client** menu and clicking the **certificates** tab. Click the **Details** icon of the certificate to display the **certificate** tab.

- Click the **Copy** link in the navigation toolbar under the certificate header.

- The **Copy Record** dialog box displays.



- The **Copy certificate coverages** will be checked. Click **Copy all holders attached to this certificate** if the certificate holder should be copied as well. All holders attached to the certificate will be copied and added to the new certificate with a status of **Active**.

> **Note**: Large lists of holders can be cleaned up and imported into the new certificate instead of copying them along with **certificate coverages**. For instructions on how to Export and Import Certificate Holders, see “Exporting and Importing Holders” later in this Chapter.

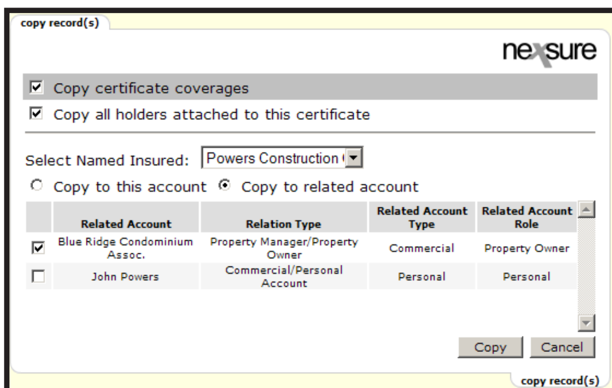
- In the **Select Named Insured** list, select the named insured that will be on the copied certificate.

> **Note:** If there are no accounts related for this client, the copy to this account and copy to related account are not available.

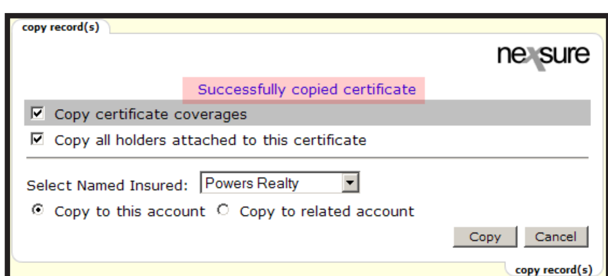
- Click the **Copy to related account** option if the certificate is to be copied to a related account.

> **Note**: See instructions for certificates copied to related accounts at the end of this section.

- All related accounts will be displayed, click the check box for each related account to copy the certificate to. There is a limit of 25 related accounts for each copy function.

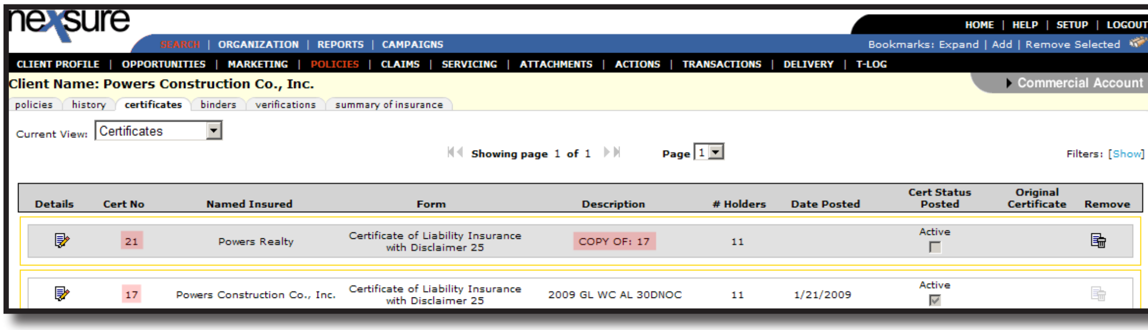


- Click the **Copy** button to copy the certificate. Click **Cancel** to abort.
- A confirmation will be displayed at the top of the copy window.



- Click **Cancel** to close the dialog box.
- The source **certificate** remains displayed providing an opportunity to create additional copies or to change the certificate’s **Status** if applicable.

- Click the **certificates** tab on the top row to view the **Certificates** summary.
- The copy of the certificate displays on the **certificates** tab with the description of **COPY OF: #** and certificate number of the original certificate. The copied certificate will not be posted, it can be edited and certificate holders edited and added as needed.

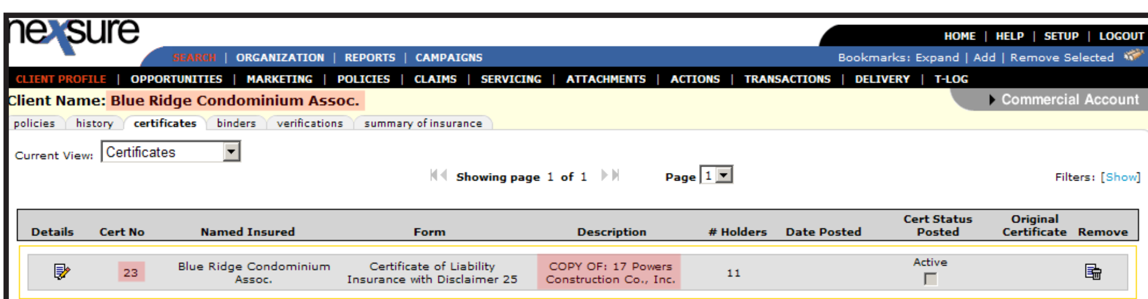


- If copied to the new certificate, all **certificate holders** attached to the source certificate are added with a status of **Active**. Use the holder **Remove** icon to remove any holders that should not be issued the new certificate. The holder's **Reference** is displayed and can be used as a guide for removing any inactive holders from the copied certificate. The **[Delete All]** link is available to delete all holders copied to the new certificate.

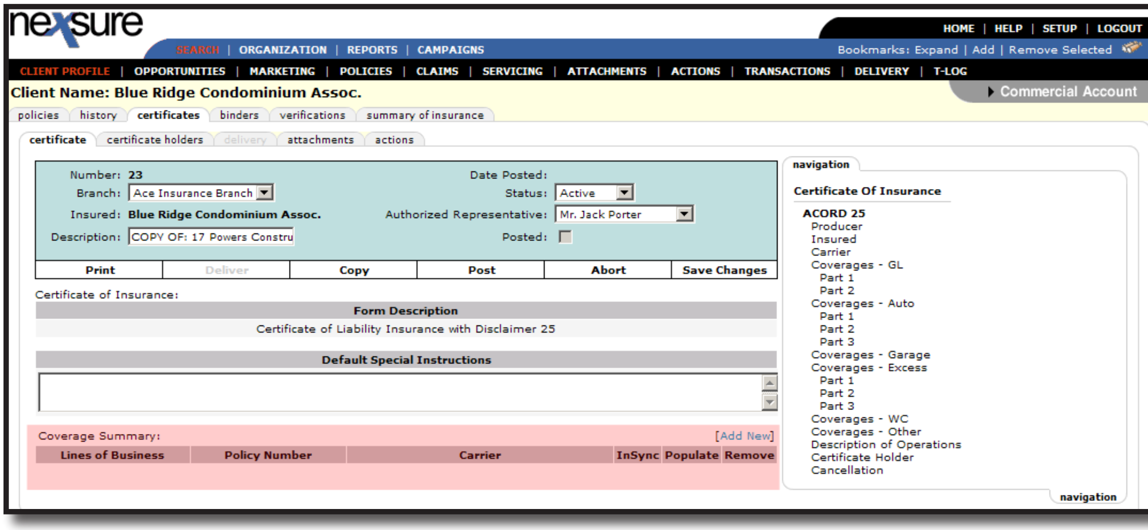
- Preview and verify information for the copied certificate and its holders, including the certificate header **Description** and **Authorized Representative**. When all information is accurate, **Post** the form and **Issue** all holders. Certificates for Issued holders may be printed or delivered.

If the certificate was copied to a related account:

- Locate the related account through **SEARCH** or the **related accounts** tab. Click the **POLICIES** link on the **Client** menu and click the **certificates** tab.
- The copy of the certificate displays with the **description** and certificate number of the original certificate.

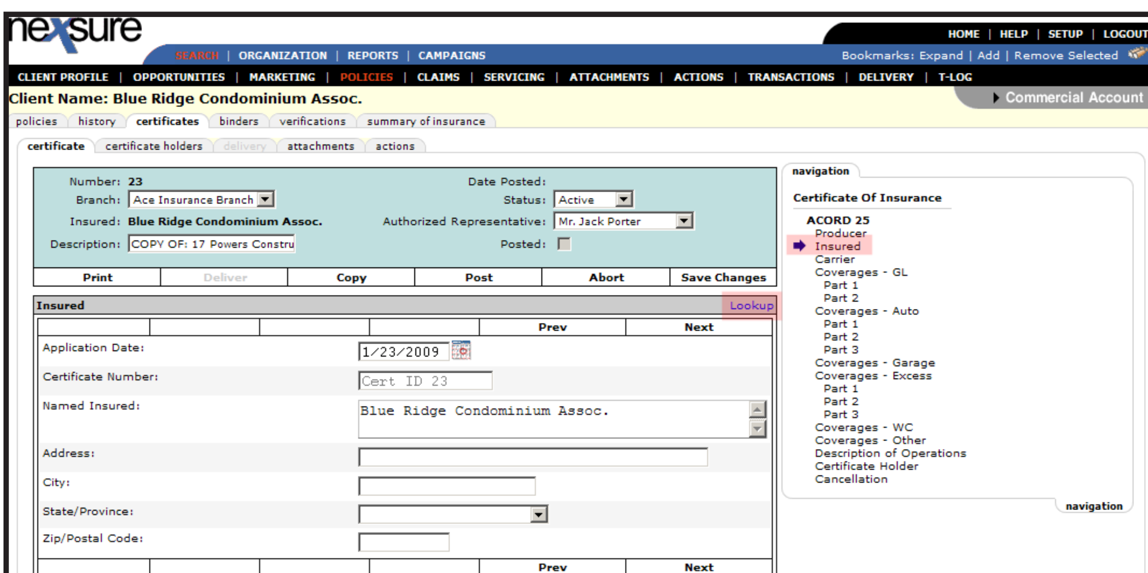


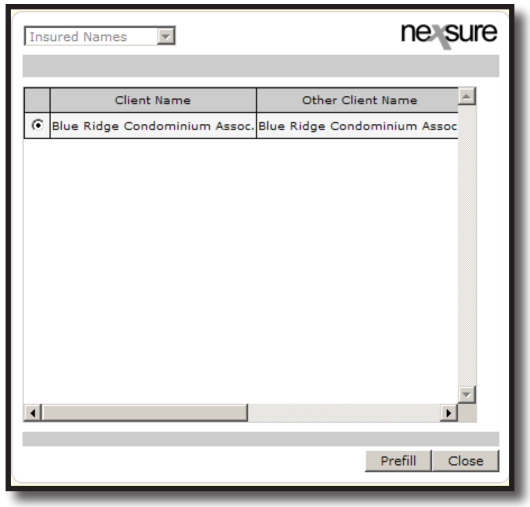
- Click the **Details** icon of the copied certificate.



- The copied **certificate** on the related account does not reference lines of business of the original certificate. All details from the original certificate are copied with the exception of the **Insured** name and mailing address.

- The selected related account's **Insured** name populates the copied certificate. Use **Lookup** to add the mailing address to the **Certificate of Insurance** > **Insured** link. After clicking the **Lookup** link, select the **Insured Name** then click the **Prefill** button to add the insured's mailing address to the certificate. See "HOW to Populate a New Certificate Form" in this chapter to populate and complete the copied certificate.





- Preview and verify information for the related account's copy of the certificate and its holders, including the certificate header **Description** and **Authorized Representative**. When all information is accurate, **Post** the form and **Issue** all holders. Certificates for Issued holders may be printed or delivered.

Exporting and Importing Holders

HOW to Export Certificate Holders

Certificate Holder schedules integrate with Microsoft Excel. Existing Holders can be exported to an Excel Workbook that can be opened in Microsoft Excel and manipulated for printing or presentation to the client. Holders may in turn be added to a certificate by importing a formatted Excel Workbook.

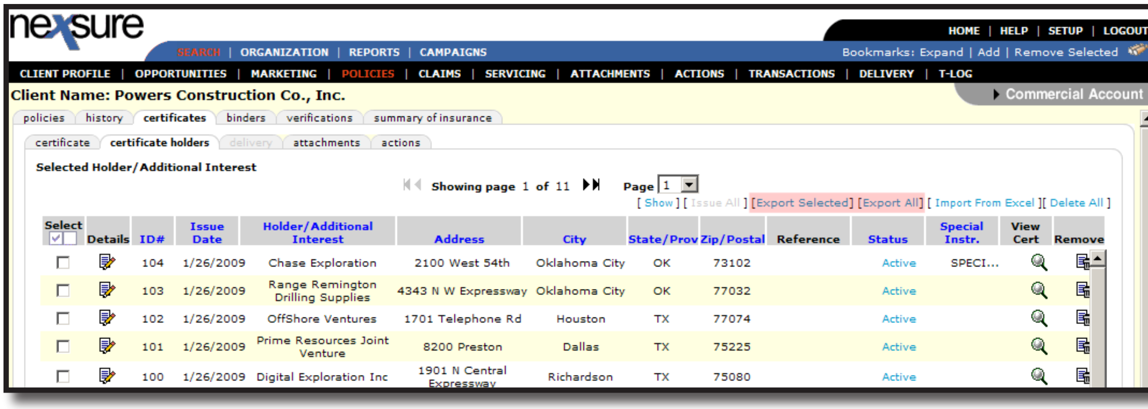
> **Note**: Provide one-time access for your client to electronically view their list of holders using **NIC**, **Nexsure Instant Collaborator**. For instructions, see "Renewing the Certificates" later in this Chapter.

Certificate Holders may be exported from either the **certificate holders** tab or the certificate tab's **Certificate Holder Summary View**. Export from the certificate's **certificate holders** tab when you want to export a list of holders attached to the one certificate. Export from the **Certificate Holder Summary View** when you want to view and export holders attached to multiple certificates.

HOW to Export Certificate Holders from the Certificate Holder Tab

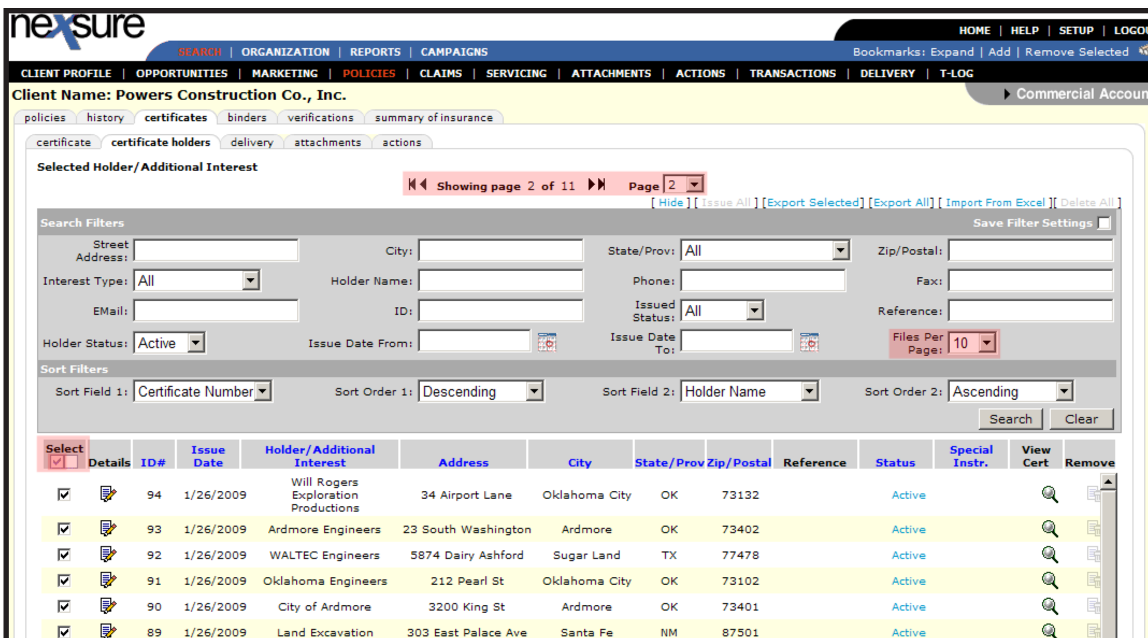
Locate the certificate from client **SEARCH** by selecting **Certificate Summary** on the client's **Details** icon right-click menu or by clicking the **POLICIES** link on the **Client** menu and the **certificates** tab.

- Click the **Details** icon of the certificate whose holders will be exported to display the certificate tab.
- Click the **certificate holders** tab.



There are two export options available, [Export Selected] and [Export All].

- [Export Selected] will export selected holders to an Excel Workbook. Selected holders are identified by placing a check in the check box next to the holder in the **Select** column. Select all holders displayed on the current page at once by clicking the **Select** check mark in the column header. Default filter settings display all Active holders, both Issued and un-Issued. Use Filter **Search Criteria** to limit the list of displayed holders to only those holders that are to be exported. Click the filter's **[Show]** link to enter new search criteria and click the **Search** button.



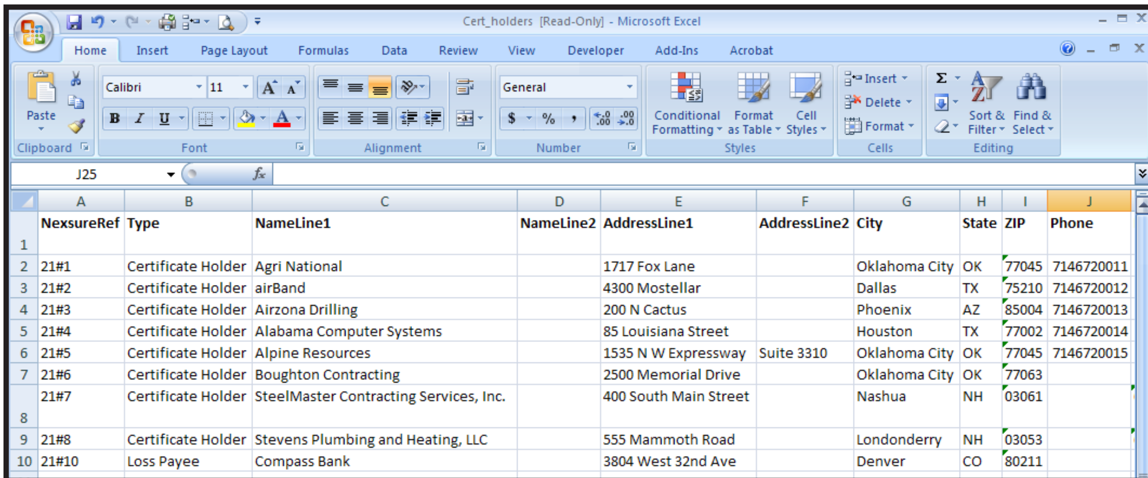
The default number of holders displayed on a page is 10. Navigate to each page of holders to be certain all holders to be exported are selected. Change the **Search Filter** criteria **Files Per Page** to **All** or a per page range of up to 100 files per page when working with large lists of holders.

After exporting selected holders, remove selections by clicking the empty **Select** check box to clear selections on the displayed page. Navigate to each page to de-select holders on each page with selected holders. Navigating away from the **certificate holders** tab will also remove any holder selections.

- [Export All] will export all holders attached to the certificate to an Excel Workbook. [Export All] will export all holders without regard to their status or displayed search results.

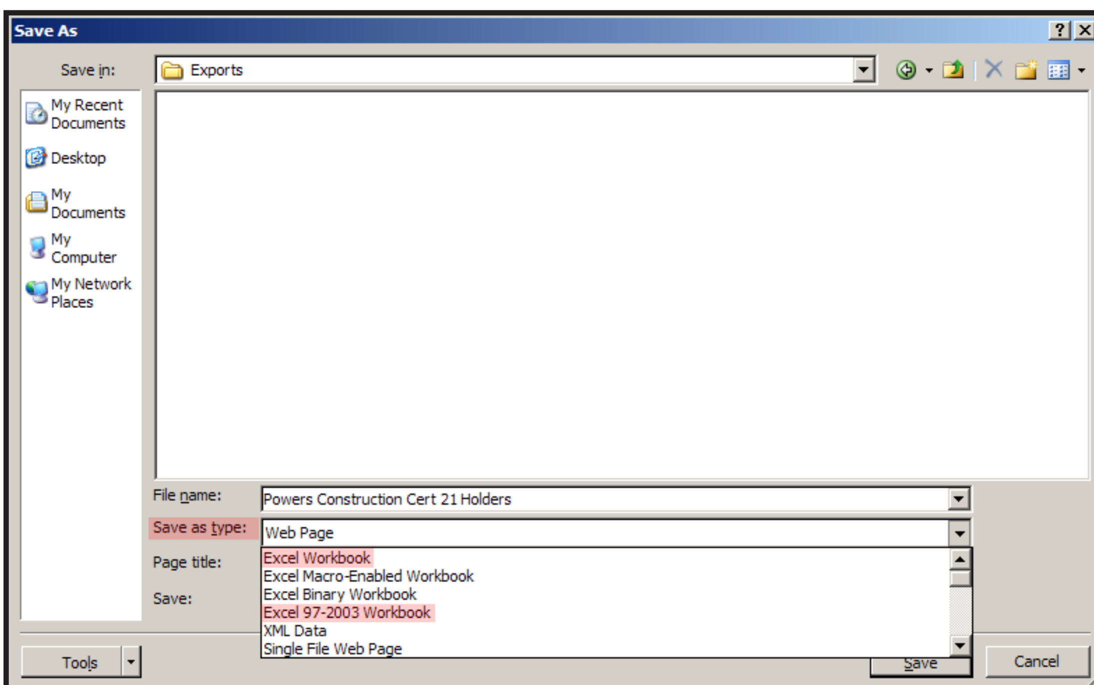
When all holders to be exported are selected click the [Export Selected] link. If the goal is to export all holders click the [Export All] link.

- Nexsure will display an alert for users running Office 2007. Click the **Yes** button to continue. If you are prompted to **Open** or **Save** the export, always **Open** first before saving.
- The exported holders will open in a web-page view of an Excel Workbook.



NexsureRef	Type	NameLine1	NameLine2	AddressLine1	AddressLine2	City	State	ZIP	Phone
21#1	Certificate Holder	Agri National		1717 Fox Lane		Oklahoma City	OK	77045	7146720011
21#2	Certificate Holder	airBand		4300 Mostellar		Dallas	TX	75210	7146720012
21#3	Certificate Holder	Airzona Drilling		200 N Cactus		Phoenix	AZ	85004	7146720013
21#4	Certificate Holder	Alabama Computer Systems		85 Louisiana Street		Houston	TX	77002	7146720014
21#5	Certificate Holder	Alpine Resources		1535 N W Expressway	Suite 3310	Oklahoma City	OK	77045	7146720015
21#6	Certificate Holder	Boughton Contracting		2500 Memorial Drive		Oklahoma City	OK	77063	
21#7	Certificate Holder	SteelMaster Contracting Services, Inc.		400 South Main Street		Nashua	NH	03061	
21#8	Certificate Holder	Stevens Plumbing and Heating, LLC		555 Mammoth Road		Londonderry	NH	03053	
21#10	Loss Payee	Compass Bank		3804 West 32nd Ave		Denver	CO	80211	

- From the **File** menu, save the page as a Microsoft Excel Workbook. The Workbook may be saved as either an Excel Workbook or an Excel 97-2003 Workbook. Be certain to name the file so that it is easily identified.



- If the saved file is not displayed, navigate to where you saved the **.xls/.xlsx** file and open the file.
- The first row of the spreadsheet contains the Nexsure Field Names required by Nexsure to properly import an updated list of holders.

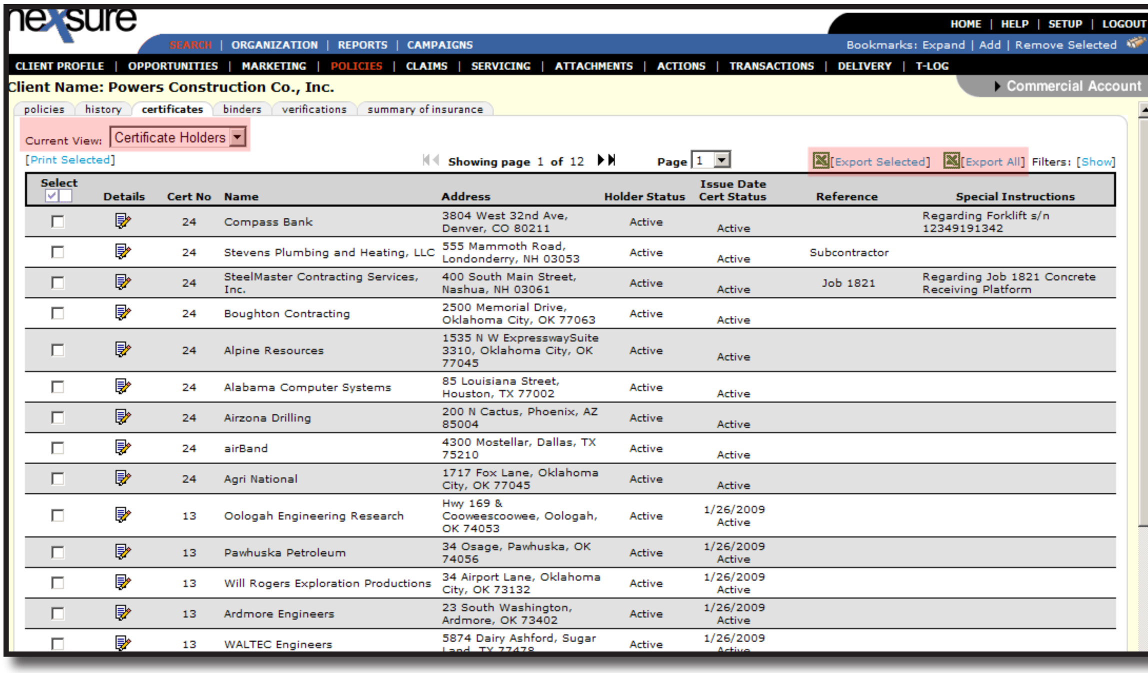
Field Name	Description
NexsureRef	Number displayed represents the Certificate Number followed by Holder ID. Delete the NexsureRef number if the holder list will be used to import holders to a certificate. Nexsure will assign a unique ID to the holder record created when the holder list is imported. The Certificate Number is determined by the certificate the holders are being added to. Maintain the original NexsureRef number only if you are re-Importing a list of un-Issued holders for the same certificate. The new import will replace information for the certificate holder with that NexsureRef number. Importing Holders without a NexsureRef number will create a new un-Issued holder record.
Type	Holder's Interest Type displays.
NameLine1 and 2, AddressLine1 and 2 City, State, ZIP	Holder's Interest Name and Primary Account Address display.
Phone, Fax, Email	Holder's Primary Contact information displays.
LoanNo	Holder's Loan Number displays.
IssueDate	Issue Date displays the date in the holder's Issued Date field. Both Issued and un-Issued holders will display an IssueDate. When the holder list is imported, the Issue Date of each new holder record is the date of import.
Reference	Holder's Reference text box information displays. Exported holder list does not include a column to indicate whether the holder record is Active or Inactive. Use the holder's Reference box to identify the reason a holder may have an Inactive status.
DescriptionsOfOperations-SpecialInstructions	The holder's unique Description of Operations / Special Instructions display.
CertStatus	Status of the holder's Certificate is displayed.

Note: Up to 5,000 records may be exported at one time.

HOW to Export Certificate Holders from the Certificate Holder Summary View

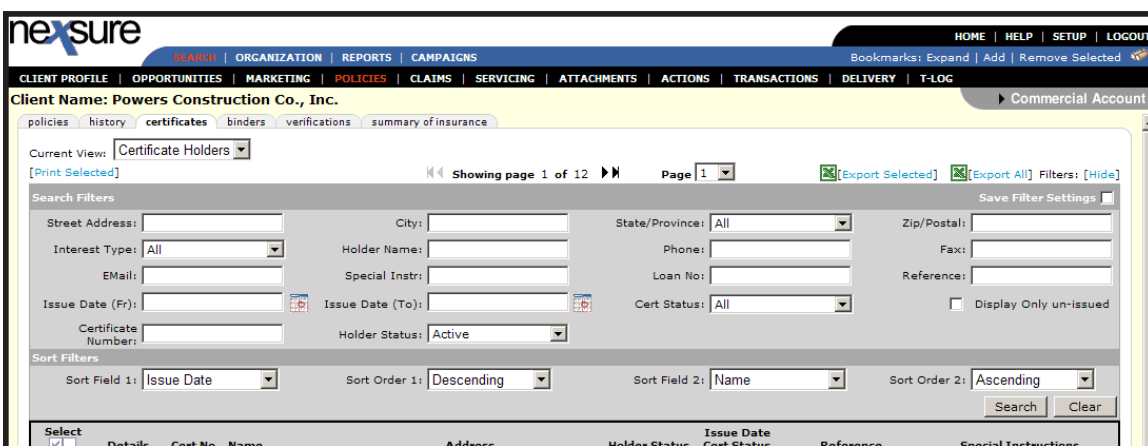
Locate the certificate from client **SEARCH** by selecting **Certificate Summary** on the client's **Details** icon right-click menu or by clicking the **POLICIES** link on the **Client** menu and clicking the **certificates** tab.

- Change the **Current View** to **Certificate Holders**. By default, all active holders for all certificates are displayed. If the client has five certificates, the active holders attached to all five certificates are displayed.



There are two export options available, [**Export Selected**] and [**Export All**].

- [**Export Selected**] will export selected holders to an Excel Workbook. Selected holders are identified by placing a check in the check box next to the holder in the **Select** column. Select all holders displayed on the current page at once by clicking the **Select** check mark in the column header. Default filter settings display all Active holders, both Issued and un-Issued. Use Filter **Search Criteria** to limit the list of displayed holders to only those holders that are to be exported. Click the filter's [**Show**] link to enter new search criteria and click the **Search** button.



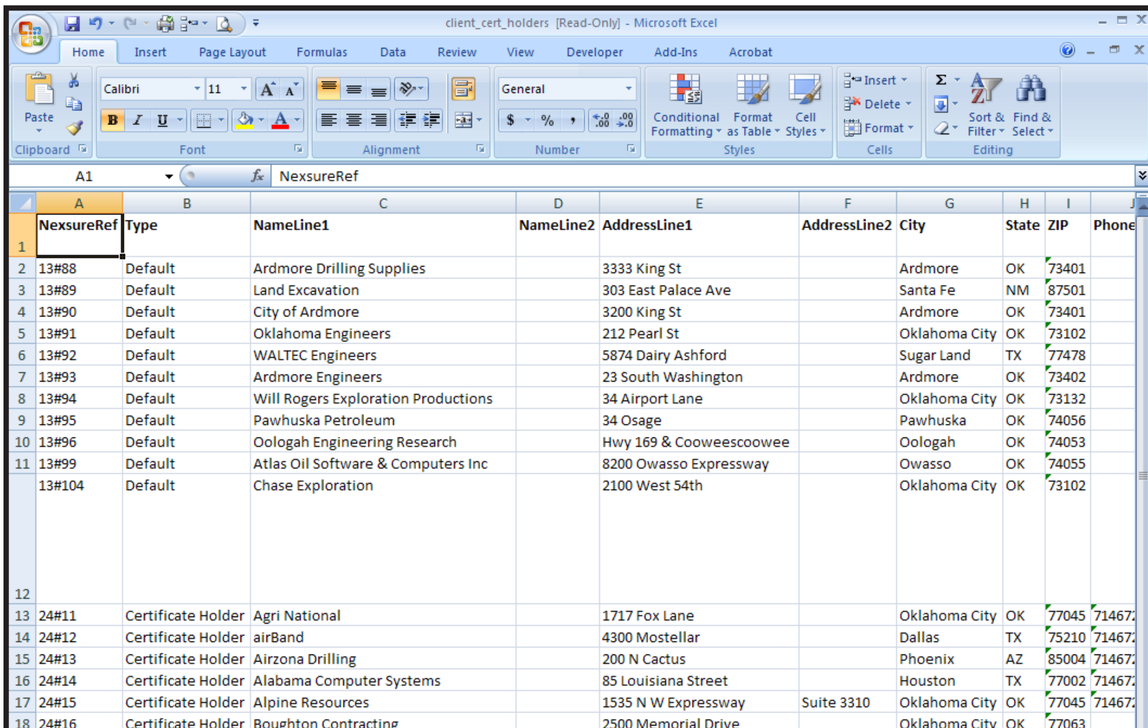
The default number of holders displayed on a page is 20. Navigate to each page of holders to be certain all holders to be exported are selected.

After exporting selected holders, remove selections by clicking the empty **Select** check box to clear selections on the displayed page. Navigate to each page to de-select holders on each page displayed. Navigating away from the **certificate holders** tab will also remove any holder selections.

- **[Export All]** will export all holders attached to all certificates to an Excel Workbook. **[Export All]** will export all holders for all of the client's certificates without regard to their status or displayed search results.

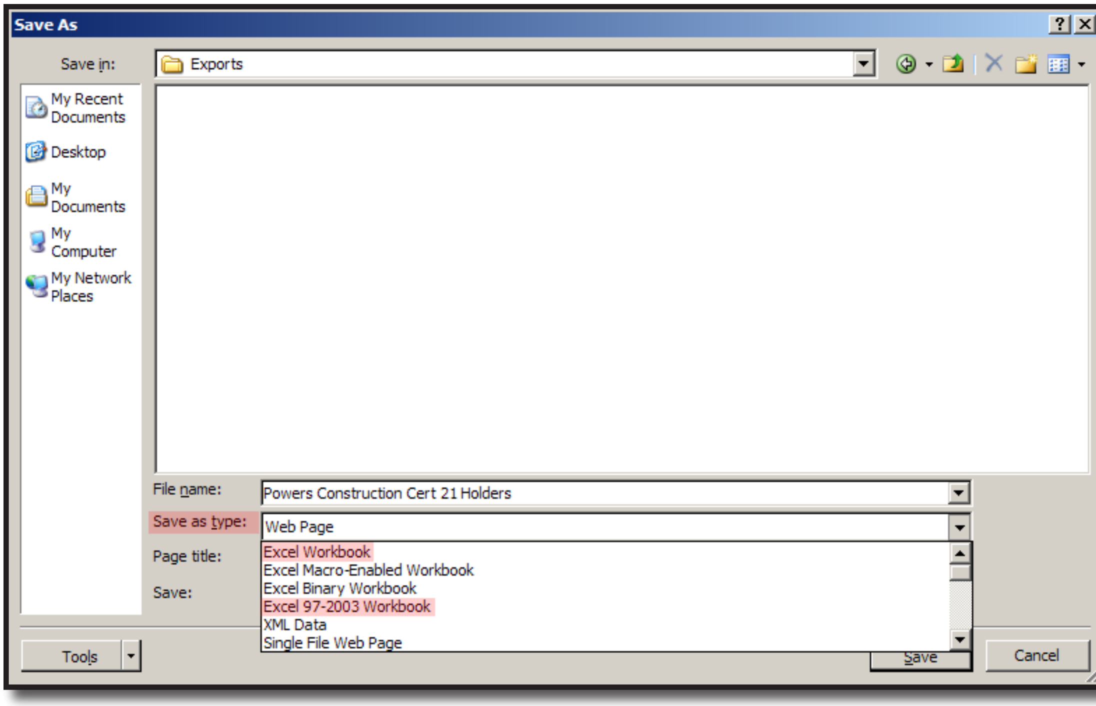
When all holders to be exported are selected click the **[Export Selected]** link. If the goal is to export all holders for all certificates click the **[Export All]** link.

- Nexsure will display an alert for users running Office 2007. Click the **Yes** button to continue. If you are prompted to **Open** or **Save** the export, always **Open** first before saving.
- The exported holders will open in a web-page view of an Excel Workbook.



	A	B	C	D	E	F	G	H	I	J
1	NexsureRef	Type	NameLine1	NameLine2	AddressLine1	AddressLine2	City	State	ZIP	Phone
2	13#88	Default	Ardmore Drilling Supplies		3333 King St		Ardmore	OK	73401	
3	13#89	Default	Land Excavation		303 East Palace Ave		Santa Fe	NM	87501	
4	13#90	Default	City of Ardmore		3200 King St		Ardmore	OK	73401	
5	13#91	Default	Oklahoma Engineers		212 Pearl St		Oklahoma City	OK	73102	
6	13#92	Default	WALTEC Engineers		5874 Dairy Ashford		Sugar Land	TX	77478	
7	13#93	Default	Ardmore Engineers		23 South Washington		Ardmore	OK	73402	
8	13#94	Default	Will Rogers Exploration Productions		34 Airport Lane		Oklahoma City	OK	73132	
9	13#95	Default	Pawhuska Petroleum		34 Osage		Pawhuska	OK	74056	
10	13#96	Default	Oologah Engineering Research		Hwy 169 & Cooweescoowee		Oologah	OK	74053	
11	13#99	Default	Atlas Oil Software & Computers Inc		8200 Owasso Expressway		Owasso	OK	74055	
12	13#104	Default	Chase Exploration		2100 West 54th		Oklahoma City	OK	73102	
13	24#11	Certificate Holder	Agri National		1717 Fox Lane		Oklahoma City	OK	77045	71467
14	24#12	Certificate Holder	airBand		4300 Mostellar		Dallas	TX	75210	71467
15	24#13	Certificate Holder	Airzona Drilling		200 N Cactus		Phoenix	AZ	85004	71467
16	24#14	Certificate Holder	Alabama Computer Systems		85 Louisiana Street		Houston	TX	77002	71467
17	24#15	Certificate Holder	Alpine Resources		1535 N W Expressway	Suite 3310	Oklahoma City	OK	77045	71467
18	24#16	Certificate Holder	Boughton Contracting		2500 Memorial Drive		Oklahoma City	OK	77063	

- From the File menu, save the page as a Microsoft Excel Workbook. The Workbook may be saved as either an Excel Workbook or an Excel 97-2003 Workbook. Be certain to name the file so that it is easily identified.



- If the saved file is not displayed, navigate to where you saved the **.xls/.xlsx** file and open the file.
- The first row of the spreadsheet contains the Nexsure Field Names required by Nexsure to properly import an updated list of holders.

Field Name	Description
NexsureRef	Number displayed represents the Certificate Number followed by Holder ID. Delete the NexsureRef number if the holder list will be used to import holders to a certificate. Nexsure will assign a unique ID to the holder record created when the holder list is imported. The Certificate Number is determined by the certificate the holders are being added to. Maintain the original NexsureRef number only if you are re-Importing a list of un-Issued holders for the same certificate. The new import will replace information for the certificate holder with that NexsureRef number. Importing Holders without a NexsureRef number will create a new un-Issued holder record.
Type	Holder's Interest Type displays.
NameLine1 and 2, AddressLine1 and 2 City, State, ZIP	Holder's Interest Name and Primary Account Address display.
Phone, Fax, Email	Holder's Primary Contact information displays.
LoanNo	Holder's Loan Number displays.
IssueDate	Issue Date displays the date in the holder's Issued Date field. Both Issued and un-Issued holders will display an IssueDate. When the holder list is imported, the Issue Date of each new holder record is the date of import.
Reference	Holder's Reference text box information displays. Exported holder list does not include a column to indicate whether the holder record is Active or Inactive. Use the holder's Reference box to identify the reason a holder may have an Inactive status.

Field Name	Description
DescriptionsOfOperations-SpecialInstructions	The holder's unique Description of Operations / Special Instructions display.
CertStatus	Status of the holder's Certificate is displayed.

Note: Up to 5,000 records may be exported at one time.

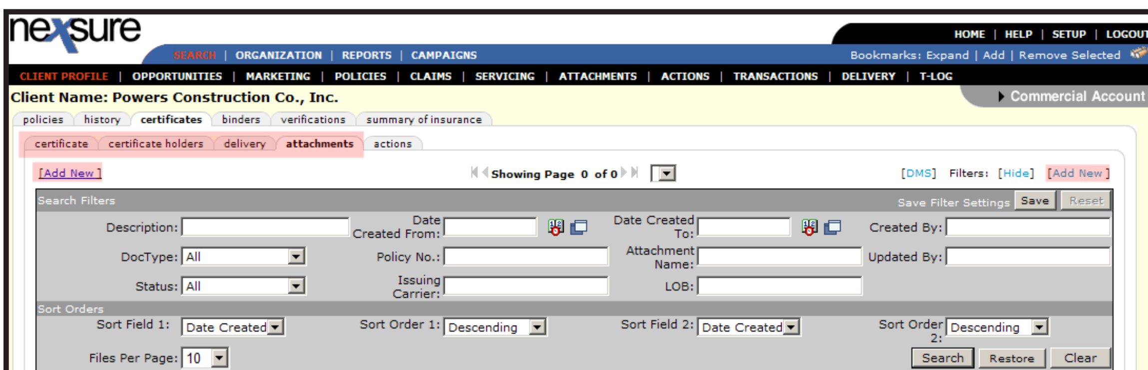
HOW to Import Certificate Holders

An Excel Workbook formatted with Nexsure Field Names for Certificate Holders is used to import a list of holders to add them to a certificate. For help creating a new certificate, see "HOW to Add a New Certificate" earlier in this Chapter.

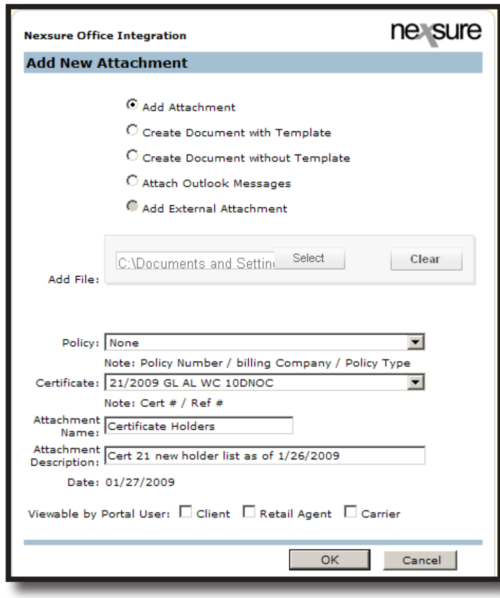
- Using an Excel Workbook with the Nexsure Field Names for Certificate Holders in Row 1, input your holders into the spreadsheet. Data is not required in every field for a successful import back into Nexsure. Columns can be rearranged, hidden or deleted. Nexsure does require columns with data have the proper **FieldName** in the first row of the Excel Workbook for a successful import. **Save** the updated certificate holder Excel Workbook .xls or .xlsx file.

- Locate the certificate whose holders will be imported from client **SEARCH** by selecting **Certificate Summary** on the cient's **Details** icon right-click menu or by clicking the **POLICIES** link on the **Client** menu and clicking the **certificates** tab. Click the **Details** icon of the certificate.

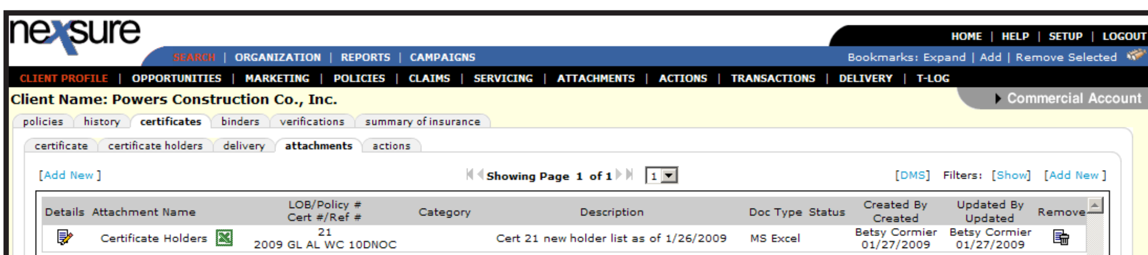
- Click the **attachments** tab.



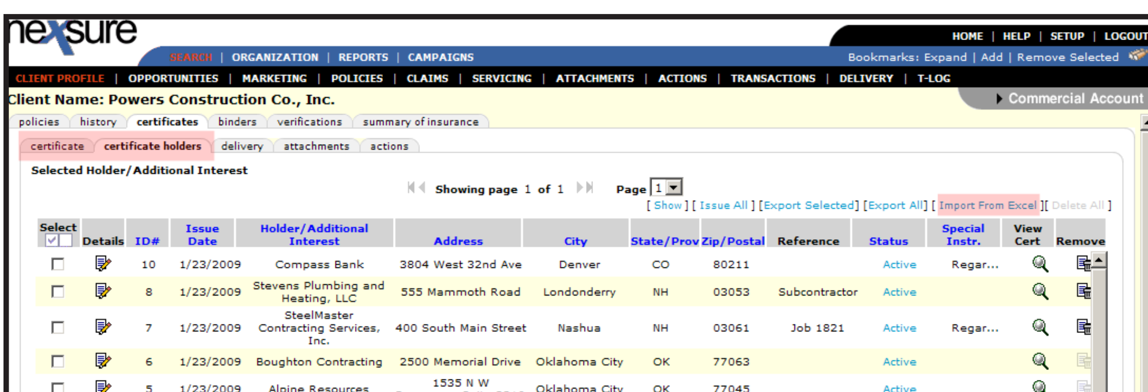
- Click the **[Add New]** link and select the **Add Attachment** option.



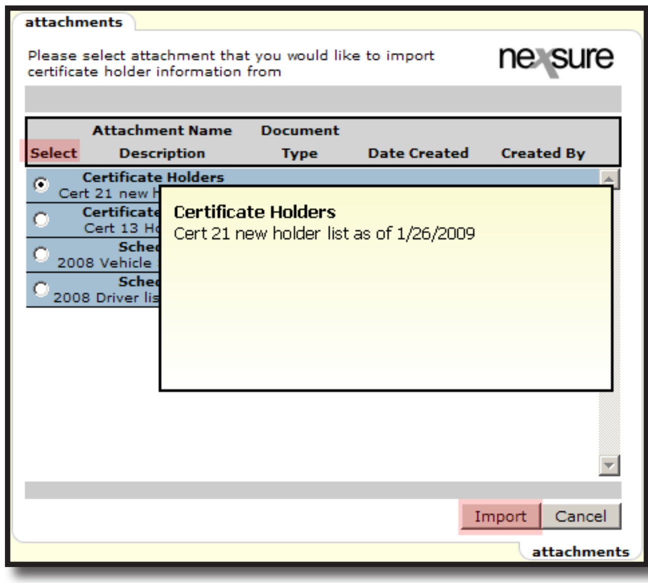
- Click the **Select** button to search for the **.xls /.xlsx** file in the **Add File** field. A different certificate or none may be selected in the attachment's **Certificate** field. Complete the **Attachment Name** and **Attachment Description** fields and click **Next**.
- The list of Certificate Holders will display on the **attachments** tab of the certificate making it available for importing. Excel Workbooks saved at **Client** level **ATTACHMENTS** are also available to select for importing to a certificate even if they are not associated to the certificate.



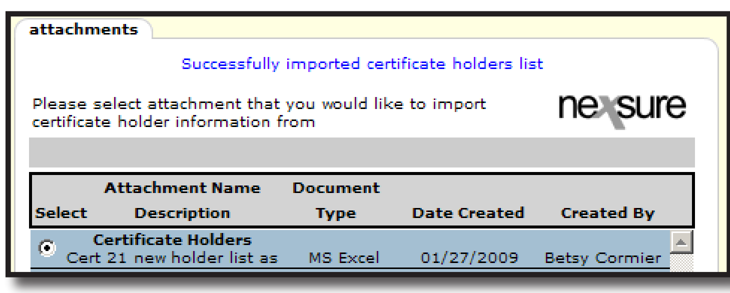
- After creating a new certificate or within an existing certificate, click the **certificate holders** tab.
- Click the **Import from Excel** link on the right side of the screen.



- The attachments dialog box is displayed. All Excel Workbook attachments for the **Client** are listed. Place your mouse over the attachment's **Description** to view the entire description and be certain you are selecting the correct certificate holder list for import. Select the attachment that the certificate holder information will be imported from.



- Click the **Import** button to import the Certificate Holders. Click **Cancel** to abort.



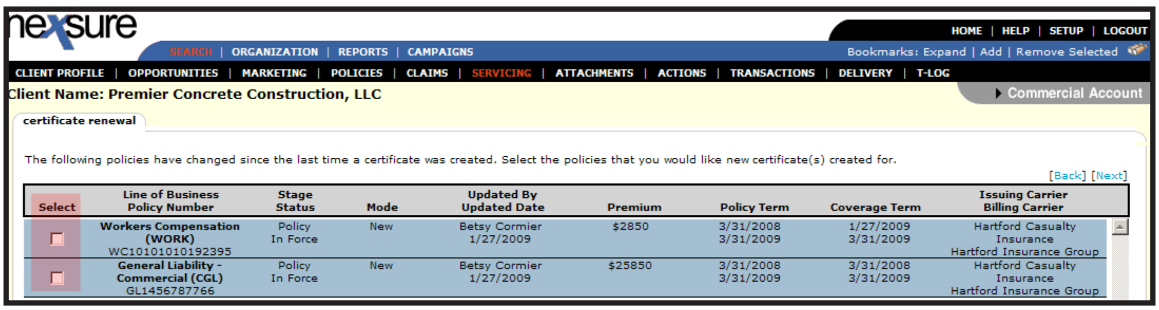
- A confirmation message will be displayed. Click the **Cancel** link to close the dialog box.
- The imported certificate holders will display on the **certificate holders** tab.
- All imported certificate holders are un-Issued and may be edited or removed until they are Issued certificates.

Renewing the Certificates

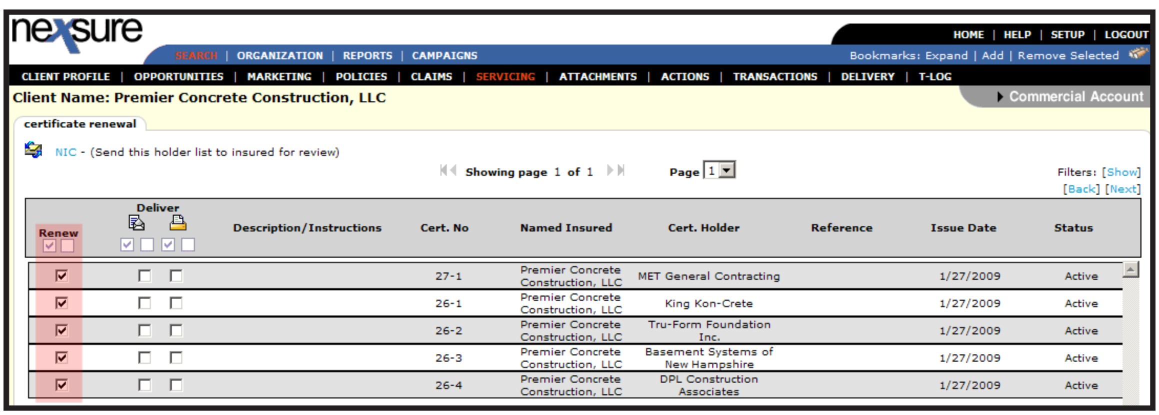
The renewal process displays policies that have changed by edit, endorsement or renewal since the last issuance of a certificate. The certificate must be posted to be available to renew.

HOW to Renew a Certificate

- Locate the appropriate client through **SEARCH** and click the **SERVICING** link on the **Client** menu.
- Click the **Certificate Renew** option and click the **[Next]** link in the upper right corner.
- A list of policies that have had a change made to them will be displayed. Select the appropriate policy(ies) by clicking the **Select** check box and clicking the **[Next]** link in the upper right corner.



- The list of holders issued certificates for the previously selected policies displays on the **certificate renewal** tab.

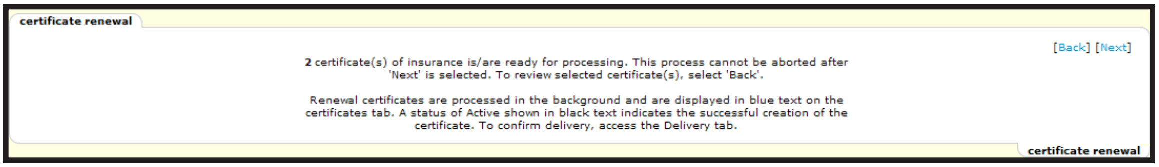


- Click the **Renew** check box to select each holder's certificate to be renewed. Click the **Renew** check box to select all holders at once. Click the empty box to clear all selections.

Note: The selection of certificates to be renewed may be made by the client's contact. Proceed to "HOW to Give a Client Access" in this Chapter.

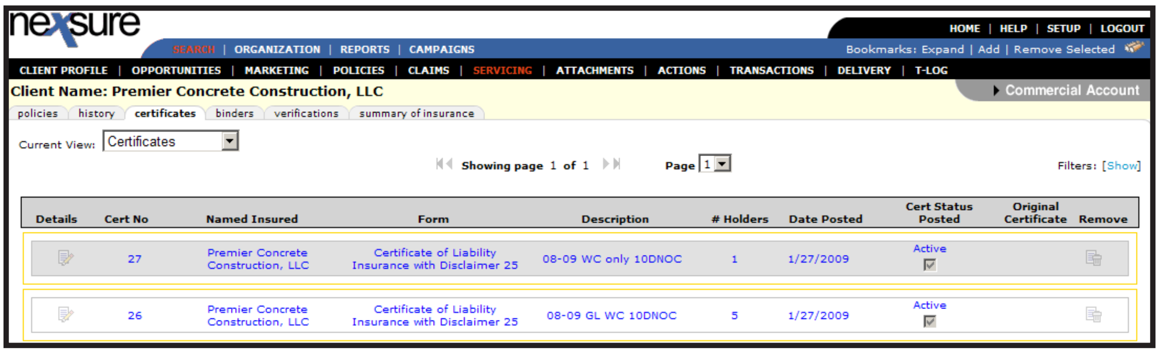
- The **Deliver** option may be used as an indicator of the holder's preferred delivery method.
- Click the **[Next]** link to process renewal of the selected certificates.

- The **certificate renewal** tab is displayed stating the number of certificates that are ready for processing. Click the **[Next]** link to process the renewal of the certificate.

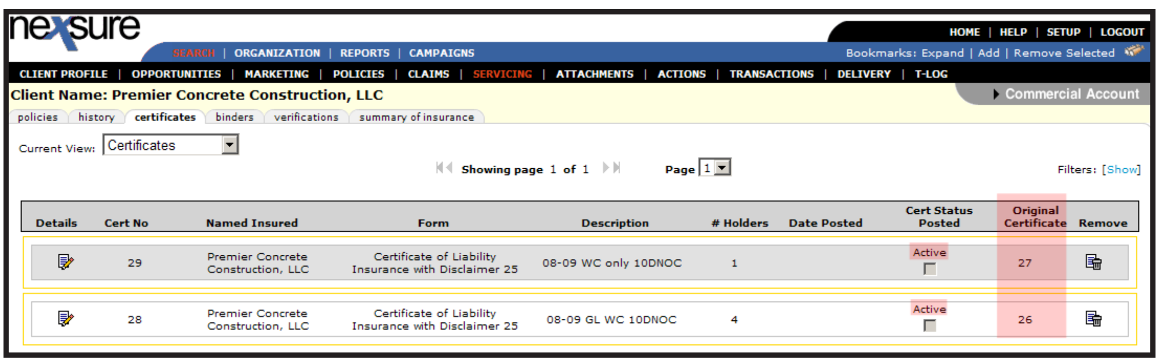


Note: The process cannot be aborted after clicking the next link.

- Renewal certificates are processed in the background and are displayed in blue text on the **certificates** tab.



- Click the **certificates** tab to refresh the screen. The certificates have finished processing when they display in black text with a **Status** of **Active**.



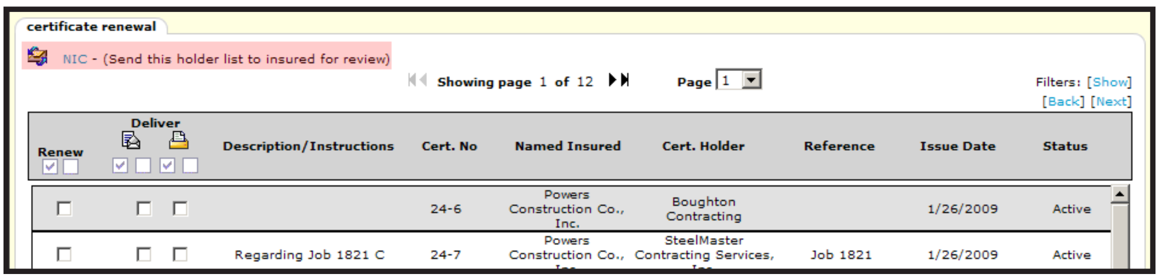
- The renewal certificate(s) are not posted. Click the **Details** icon of each renewed certificate to finalize and **Issue**.

- The **Original Certificate** number displayed on the **Certificate Summary** view indicates the certificate is a renewal of a previous certificate. Through the certificate renewal process, the original certificate's **Status** is changed to **Inactive** and no longer displays in the summary by default. Click the filter's **[Show]** link to search for and display the original **Inactive** certificates if desired.

HOW to Give a Client Access

Clients may have numerous certificate holders associated to a policy, but not wish to issue a certificate renewal to every holder. Temporary access can be granted to clients so they can select which certificate holders will be issued a renewed certificate.

- Locate the appropriate client through **SEARCH** and click the **SERVICING** link on the **Client** menu.
- Click the **Certificate Renew** option and click the **[Next]** link in the upper right corner.
- A list of policies that have had a change made to them will be displayed. Select the appropriate policy by click in the **Select** check box and click the **[Next]** link in the upper right corner.
- If the agent would like the client to select the certificate holders needing a renewal certificate, click the NIC (Nexsure Instant Collaborator**) link in the upper left corner.



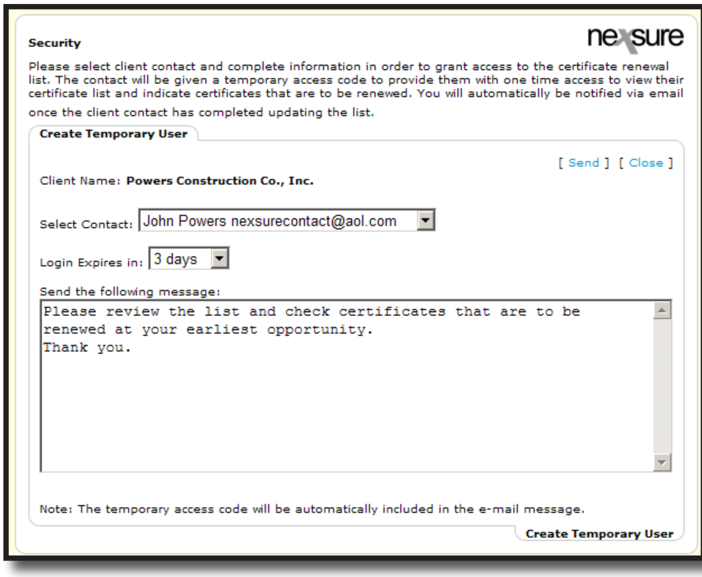
- The **Create Temporary User** dialog box is displayed. The client name will prefill with the primary named insured. Select the **contact** from the list to grant temporary access to.

Note: If the client you wish to grant access to is not in the list, they must be added, along with their e-mail address, to the contacts tab of the client.

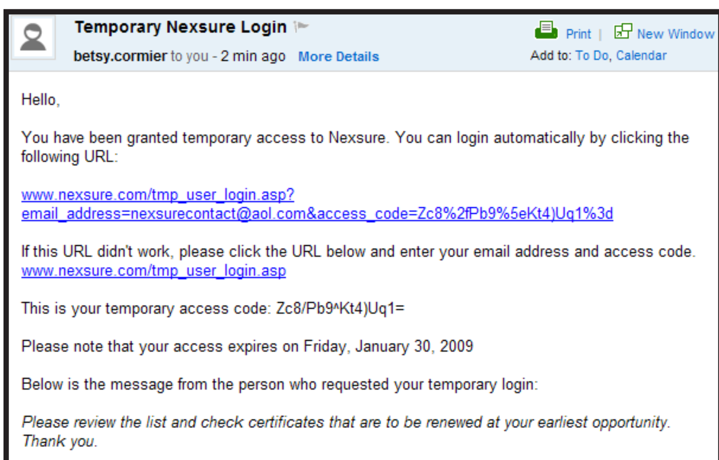
- Select the number of days the **Login** will be active from the list.
- Enter a message in the message field or accept the default message.

nexsure instant collaborator

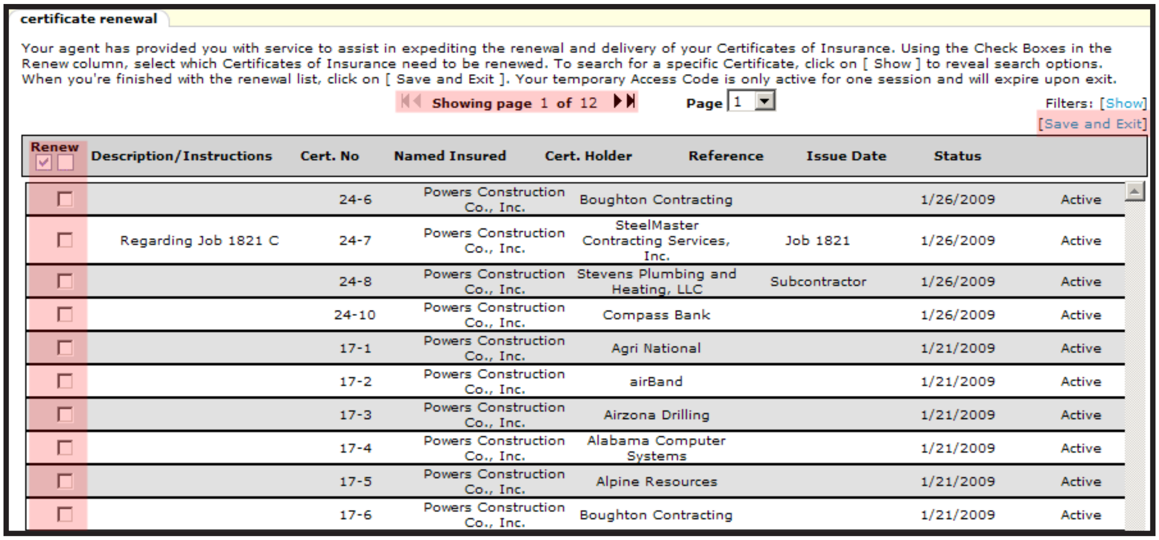
** Nexsure Instant Collaborator (NIC): NIC operates by simply extending to the person(s) involved, highly secured access to the specific area within Nexsure for direct input or update of the required information.



- Click the **[Send]** link. A confirmation message will be displayed and the dialog box will remain open to grant temporary access for other contacts.
- Click the [**Close**] link to close the window after all logins have been created.
- An e-mail containing a link to the certificates will be delivered to the contact.



- The contact will be able to click the link in the e-mail to be directed to the certificates. Instructions are included if the link to connect is not enabled in their e-mail.
- The client can then select the certificates holders needing to be renewed. When done they will click on the **Save and Exit** link.


certificate renewal

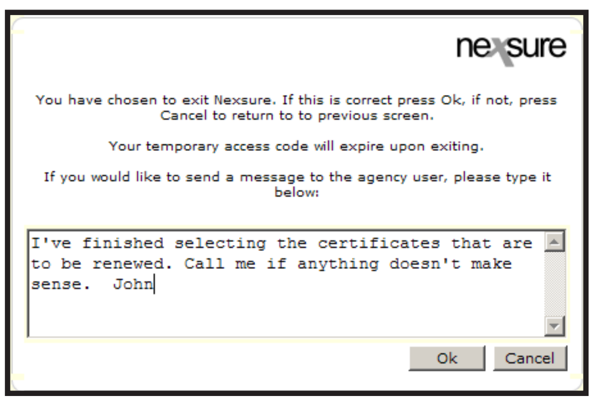
Your agent has provided you with service to assist in expediting the renewal and delivery of your Certificates of Insurance. Using the Check Boxes in the Renew column, select which Certificates of Insurance need to be renewed. To search for a specific Certificate, click on [Show] to reveal search options. When you're finished with the renewal list, click on [Save and Exit]. Your temporary Access Code is only active for one session and will expire upon exit.

Showing page 1 of 12 Page 1 Filters: [Show] [Save and Exit]

Renew	Description/Instructions	Cert. No	Named Insured	Cert. Holder	Reference	Issue Date	Status
☐		24-6	Powers Construction Co., Inc.	Boughton Contracting		1/26/2009	Active
☐	Regarding Job 1821 C	24-7	Powers Construction Co., Inc.	SteelMaster Contracting Services, Inc.	Job 1821	1/26/2009	Active
☐		24-8	Powers Construction Co., Inc.	Stevens Plumbing and Heating, LLC	Subcontractor	1/26/2009	Active
☐		24-10	Powers Construction Co., Inc.	Compass Bank		1/26/2009	Active
☐		17-1	Powers Construction Co., Inc.	Agri National		1/21/2009	Active
☐		17-2	Powers Construction Co., Inc.	airBand		1/21/2009	Active
☐		17-3	Powers Construction Co., Inc.	Airzona Drilling		1/21/2009	Active
☐		17-4	Powers Construction Co., Inc.	Alabama Computer Systems		1/21/2009	Active
☐		17-5	Powers Construction Co., Inc.	Alpine Resources		1/21/2009	Active
☐		17-6	Powers Construction Co., Inc.	Boughton Contracting		1/21/2009	Active

Note: The temporary access code is only active for one session and will expire when the client exits the screen.

- Once the user has accessed the certificate(s) and clicked on the **Exit** link, an e-mail will be returned to the Nexsure agent notifying them that the contact has reviewed the summary of insurance.



- Return to the client and complete the certificate renewal process through the **Certificate Renew** option on the **Client** menu **SERVICING** link. At the step in the process where the holder's certificates on the **certificate renewal** tab are selected for renewal, the client's selections will display. Verify the selections and continue the renewal process. For more information see "HOW to Renew a Certificate" earlier in this Chapter.

Note: For client certificate access, consider using Confirmnet's Certificates Now. Confirmnet® is not a part of Nexsure and any fees for Certificates Now is paid directly to Confirmnet. More details can be obtained by contacting Confirmnet directly.

Notes