

# Policy Download Quick Start

The Policy Download Quick Start guide offers a view into how policies are automatically processed in Nexsure once they are received from the carriers. The carrier will send the daily AL1 and AL3 download packages to the agency. Once Nexsure receives the downloads, the policy is matched up with the **Data Attributes** (Transaction Type, Stage, Status and Mode) to determine what search criteria is used to find the policy in Nexsure. The search criteria used is located in the **Download Search Path** columns. Once the policy is found in Nexsure the actions noted in the **Action for Download** columns are applied to the policy. The **Rules** column describes each Transaction Type in the download process.

Data Attributes				Download Search Path						Action for Download								Rules	
Transaction Type	Stage	Status	Mode	Branch Code	Carrier NAIC Code/ Commission	Client Name	Policy Number	Policy Term	Coverage Term	Non-renewing Box marked	Coverage Term populated	Policy Added to In Force List	Cancellation Form Added	Cancellation Aborted	Policy Added to History only	Copy of Policy remains in History	Exp. Version of Policy sent to History	Manual Action Needed	Rule
New Business	Policy	Received	New	X	X	X	Unassigned or TBD or no existence	Yes or no existence	N/A	N/A	X	X	N/A	N/A	N/A	N/A	If matching policy exists	N/A	Create a new policy, if a new business policy already exists (exact policy term and NAIC code) send existing policy to history and create the new one. Policy number must be unassigned or TBD but not in marketing.
Endorsement (Policy Change)	Policy	Received	No change	X	X	X	X	X	X	N/A	X	X	N/A	N/A	N/A	N/A	X	N/A	Send existing policy to History and create a new one. Coverage Term effective date is updated to the transaction effective date. Policy Term will remain the same.
Renewal	Policy	Received	Renew	X	X	X	X	X	N/A	N/A	X	X	N/A	N/A	N/A	N/A	N/A	Click the <b>Details</b> icon of the expired policy. On the underwriting screen, click the <b>History</b> link on the navigation toolbar. Save. Expired version is now located in History.	Create renewal policy, leave existing policy active. User must send expired policy to History. The Status of the existing policy will be changed to <b>Renewed</b> .
Non-Renewal	Policy	Received	No change	X	X	X	X	X	N/A	X	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Click the <b>Details</b> icon of the expired non-renewed policy. On the underwriting screen, click the <b>History</b> link on the navigation toolbar, select status and enter info to locate later in history. Save. Non-renewed policy is now located in History.	The Non-renewing check box is selected. Agency must send to history.
Cancellation (Current date or in the past)	Cancellation	Cancellation	No change	X	X	X	X	X	N/A	N/A	X	N/A	X	X	X	N/A	N/A	N/A	If the transaction effective date is the current date or in the past a cancellation form will be attached to the current policy and will be sent to history. Coverage Term Expiration Date is updated to the Transaction Effective Date. Policy Term will remain the same.
Cancellation (Future)	Pending Cancellation	Cancellation	No change	X	X	X	X	X	N/A	N/A	X	X	X	X	N/A	N/A	N/A	If the policy is not reinstated: Click the <b>Details</b> icon of the expired policy. On the underwriting screen, click the <b>History</b> link on the navigation toolbar. Save. Expired version is now located in History. (Note: Monitor these type policies from the <b>HOME &gt; CANCELLATIONS</b> screen).	If the transaction date is in the future, a cancellation form is attached to the policy and identified as a Pending Cancellation.

Legend	
X = Required Match Criteria	N/A = Not Applicable to Match Criteria



# Policy Download Quick Start

The Policy Download Quick Start guide offers a view into how policies are automatically processed in Nexsure once they are received from the carriers. The carrier will send the daily AL1 and AL3 download packages to the agency. Once Nexsure receives the downloads, the policy is matched up with the **Data Attributes** (Transaction Type, Stage, Status and Mode) to determine what search criteria is used to find the policy in Nexsure. The search criteria used is located in the **Download Search Path** columns. Once the policy is found in Nexsure the actions noted in the **Action for Download** columns are applied to the policy. The **Rules** column describes each Transaction Type in the download process.

Data Attributes				Download Search Path						Action for Download									Rules	
Transaction Type	Stage	Status	Mode	Branch Code	Carrier NAIC Code/ Commission	Client Name	Policy Number	Policy Term	Coverage Term	Non-renewing Box marked	Coverage Term populated	Policy Added to In Force List	Cancellation Form Added	Cancellation Aborted	Policy Added to History only	Copy of Policy remains in History	Exp. Version of Policy sent to History	Manual Action Needed	Rule	
Reinstatement (Pending Cancellation)	Policy	Received	No change	X	X	X	X	X	N/A	N/A	X	N/A	N/A	X	N/A	N/A	N/A	N/A	N/A	Pending cancellation is aborted.
Reinstatement (Policy in History)	Policy	Received (Reinstated in future version)	No change	X	X	X	X	X	N/A	N/A	X	X	N/A	N/A	N/A	X	N/A	N/A	N/A	A reinstated policy is added to the <b>In Force</b> list and the existing cancellation remains in History. Both History and Active policy will have status of <b>Reinstated</b> .
Rewrite (Current date or in the past)	Policy	Rewritten	No change	X	X	X	X	X	N/A	N/A	X	X	N/A	N/A	N/A	N/A	X	N/A	N/A	If the transaction effective date is the current date or in the past a new policy is created and the current policy is sent to History.
Rewrite (Future)	Policy	Rewritten	No change	X	X	X	X	X	N/A	N/A	X	X	N/A	N/A	N/A	N/A	N/A	N/A	Click the <b>Details</b> icon of the policy that was rewritten. On the underwriting screen, click the <b>History</b> link on the navigation toolbar. Save. Expired version is now located in History.	Creates a rewritten policy and the existing policy remains active. User must send the old policy to History.
Re-Issue (Current date or it the past)	Policy	Rewritten	No change	X	X	X	X	X	N/A	N/A	X	X	N/A	N/A	N/A	N/A	X	N/A	N/A	If the transaction effective date is the current date or in the past a new policy is created and the current policy is sent to History.
Re-Issue (Future)	Policy	Rewritten	No change	X	X	X	X	X	N/A	N/A	X	X	N/A	N/A	N/A	N/A	N/A	N/A	Click the <b>Details</b> icon of the policy that was rewritten. On the <b>underwriting</b> screen, click the <b>History</b> link on the navigation toolbar. Save. Expired version is now located in History.	A rewritten policy is added and the existing policy remains active. User must send old policy to History.
Database Synchronization	Policy	Received	No change	X	X	X	X	X	N/A	N/A	X	X	N/A	N/A	N/A	N/A	If exists	N/A	N/A	Existing policy is sent to History and a new In Force policy is added.
Direct Bill Commission	N/A	N/A	N/A	X	X	X	X	X	X	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Administrators only: Follow instructions in <b>HELP</b> under Commission Downloads.	Attach Direct Bill Commission to existing policy.
Miscellaneous Print	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Miscellaneous prints are read-only and will open in a new browser window when selected.
Memo	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Memos are read-only and will open in a new browser window when selected.



Legend	
X = Required Match Criteria	N/A = Not Applicable to Match Criteria