

Cloning

Copying one audit to another audit in an effort to save time and reduce errors. The audits can be the same or different types.

Cloning Button. Use this for the audit you want to clone from.

The audit you are cloning from must be completed. You can verify whether it was transmitted by the absence of the call/letter indicator.

Drag a column header and drop it here to group by that column

| Row | Actions | Call/Letter | ControllId | ConcurrentIds | Related Audits | Rush | RefNbr | PolicyNumber | PolicyType | InsuredName |
|-----|---------|----------------------|----------------------|----------------------|----------------------|--------------------------|----------------------|----------------------|----------------------|----------------------|
| | | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 1 | | | 71907 | 71908 | | | | 08325171 | WC | LAZAROV INC |
| 2 | | | 71908 | 71907 | | | | 08839416 | GL - Payroll & Sales | LAZAROV INC |

Choose the audit you want to clone to from the drop down.

Are you sure you want to clone case: 71907

Type of clone: Clone audit data into existing case

Clone audit data into existing case is used when there is already an active case on inventory and you want to clone data from another audit into that active case.

You can choose whether or not to include the Class Codes from the case being cloned from. Examples of when this is used are:

- 1) If you completed an audit on the same insured last year and you want to clone that information to the current year's audit (typically a situation where you would also want to
- 2) If you want to clone data from a WC audit into a companion GL audit (typically a situation where you may not want to include class code data due to the different policy types

ControllId to clone into:

71908 - LAZAROV INC

Include Class Code Data (cloning into audit with same Policy Type)

Include Estimates Data (cloning into audit with same Policy Type)

Include Claims Data (cloning into audit with same Policy Type)

Clone Progress Notes:

Yes No

If the audits are of different types, make sure you uncheck this box.

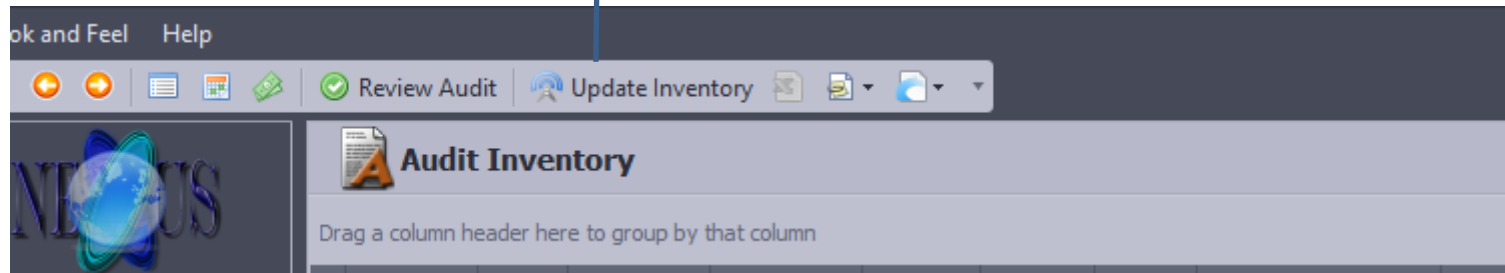
When finished, click yes

If successful, the audit you are cloning to will show up in the next screen.

Control ID: 71908 Insured: LAZAROV INC Policy: 08839416 Policy Term: 11/10/2021 - 11/10/2022 Date Due: 1/9/2023

| Information | Insured Information | Location | Agent Information | Entities/Locations | Policies | Notes | Documents | History | Rep Pay | Alerts |
|-------------------------|--------------------------|--------------------|--------------------------|----------------------|--------------------------|------------------|--------------------------|---------|---------|--------|
| Generic | | | | | | | | | | |
| Customer: | Auto-Owners Minnesota | Alternate Carrier: | | Detailed: | NotScheduled | Status: | InProcess | | | |
| Service: | PhyAudit | Type: | Annual | EntityType: | Corporation | Rep: | Hope Campbell | | | |
| PrevYrControllId: | | ClonedControllId: | 71907 | DuplicateControllId: | | ConcurrentId: | 71907 | | | |
| Age: | 33 | AuditorAge: | 28 | DaysPastDue: | -27 | ExtraInfo: | | | | |
| Policyholder Completed: | <input type="checkbox"/> | Partner ID: | | Industry Group: | Select | Service Center: | Select | | | |
| GoverningClass: | | GoverningState: | | SIC: | | Branch/Division: | | | | |
| Trip: | <input type="checkbox"/> | Rush: | <input type="checkbox"/> | Escalated: | <input type="checkbox"/> | Dividend State: | <input type="checkbox"/> | | | |
| NextYrServiceType: | Select Type | Reference #: | | Collection Status: | None | Payroll Partner: | | | | |
| Underwriter: | Select | Billing Priority: | | Related Audits: | | | | | | |

In order for the cloned information to transfer, you must update your Nexus Audit Software



The payroll, ownership, and verification information has transferred. You only need to update your GL class codes!

Officers (Total Ownership: 100.00%)

Layout: Officer D

Verification (Total: 238,888, Difference: 0, 0.0%)

Payroll (Total: 238,888)

ID: 1,001

Formula:

Move to next row on Enter

Split Period:

Drag a column header here to group by that column

| ID | off/bal | First Name | Last Name | # of Emp | Duties | Location # | State | GL Code | GL Exposure | Audit Period (Payroll) | Payroll Total | OT (OT @ 1.5) | Adjustment (Adjustment) |
|------|---------|------------|-------------|----------|--------------------|------------|-------|---------|-------------|------------------------|---------------|---------------|-------------------------|
| 1001 | | Maria | Delrio | 1 | Office Assistant | 1 | MN | | | 21,425 | 21,425 | | |
| 1002 | | Robert | Facante | 1 | Lawn Maintenance | 1 | MN | | | 41,166 | 41,166 | | |
| 1003 | | Jorge | Jimenez | 1 | Snow Removal | 1 | MN | | | 3,978 | 3,978 | | |
| 1004 | | Jose | Jimenez | 1 | Lawn Maintenance | 1 | MN | | | 40,275 | 40,275 | | |
| 1005 | | Brooke | Lazarov | 1 | Office Assistant | 1 | MN | | | 8,600 | 8,600 | | |
| 1006 | Y | Ross | Lazarov | 1 | Owner/Business ... | 1 | MN | | | 88,000 | 88,000 | | |
| 1007 | | Aria | Mastenbrook | 1 | Tool Shipping | 1 | MN | | | 9,857 | 9,857 | | |
| 1008 | | Kramer | Perez | 1 | Lawn Maintenance | 1 | MN | | | 11,878 | 11,878 | | |
| 1009 | | Elizabeth | Swenson | 1 | Tool Shipping | 1 | MN | | | 2,652 | 2,652 | | |
| 1010 | | Kayla | Overman | 1 | Tool Shipping | 1 | MN | | | 2,657 | 2,657 | | |
| 1011 | | Robert | Facante | 1 | Snow Removal | 1 | MN | | | 4,200 | 4,200 | | |
| 1012 | | Jose | Jimenez | 1 | Snow Removal | 1 | MN | | | 4,200 | 4,200 | | |

Even the description of operations transfers. You need to make minor adjustments for the GL class codes and description, and you are all done!

The audit was completed with Ross Lazarov. Phone: 612-306-9696

Lazarov Inc is a MN corporation whose principle business operations occur from 2957 179th St E, Prior Lake, MN. No other DBA's and or address locations were discovered at the time of the audit interview.

Insured operates as a lawn maintenance contractor in and around Prior Lake, MN. Insured does perform snow removal by plow and hand shoveling in the winter months. Insured is also a tool distributor. All operations within MN.

Staff include:

Two part time office assistants. (8810)
Shipping staff for the tool sales. (3400)
Field lawn maintenance staff. (9102)
Field snow removal staff. (9402)

No overtime was reported.