

Search in Agent Center Workspace

Instructional Guide

- **Purpose:** This instructional guide provides directions for the different search types in Agent Center Workspace.

- **Prerequisites:** None

- **Helpful Hints:** All applications that launch from this portal open in a new window.

Search in Agent Center Workspace



Search: Search for a client, policy, billing information, or claims.

1. Select a **Search Type**.
2. Enter a **Policy Number**.
 - **NOTE:** If you complete a search by policy number, click on the question mark icon to verify the policy number format.
3. Click the **Search** button to open Policy Viewer.

The screenshot shows the 'Agent Center Workspace' interface. At the top, there's a header with the Nationwide logo and navigation links: 'Get a Quote', 'Change a Policy', 'Tools', and 'Admin & Reports'. Below the header, a greeting 'Good morning!' and the date 'Monday, November 16, 2020' are displayed. The main section is titled 'Quick Inquiry' with a link to 'Advanced Search'. Below this, there are two input fields: 'Search Type' (a dropdown menu currently showing 'Policy—Comm/Agri') and '*Policy Number' (a text input field). A blue 'Search' button is positioned to the right of the 'Policy Number' field. Three large yellow arrows with black outlines and numbers 1, 2, and 3 are overlaid on the interface to guide the user: Arrow 1 points to the 'Search Type' dropdown, Arrow 2 points to the 'Policy Number' input field, and Arrow 3 points to the 'Search' button. To the right of the search fields is a large banner featuring the Nationwide logo and the word 'Nationwide'. At the bottom right of the interface, there is a checkbox labeled 'View Unread Only'.

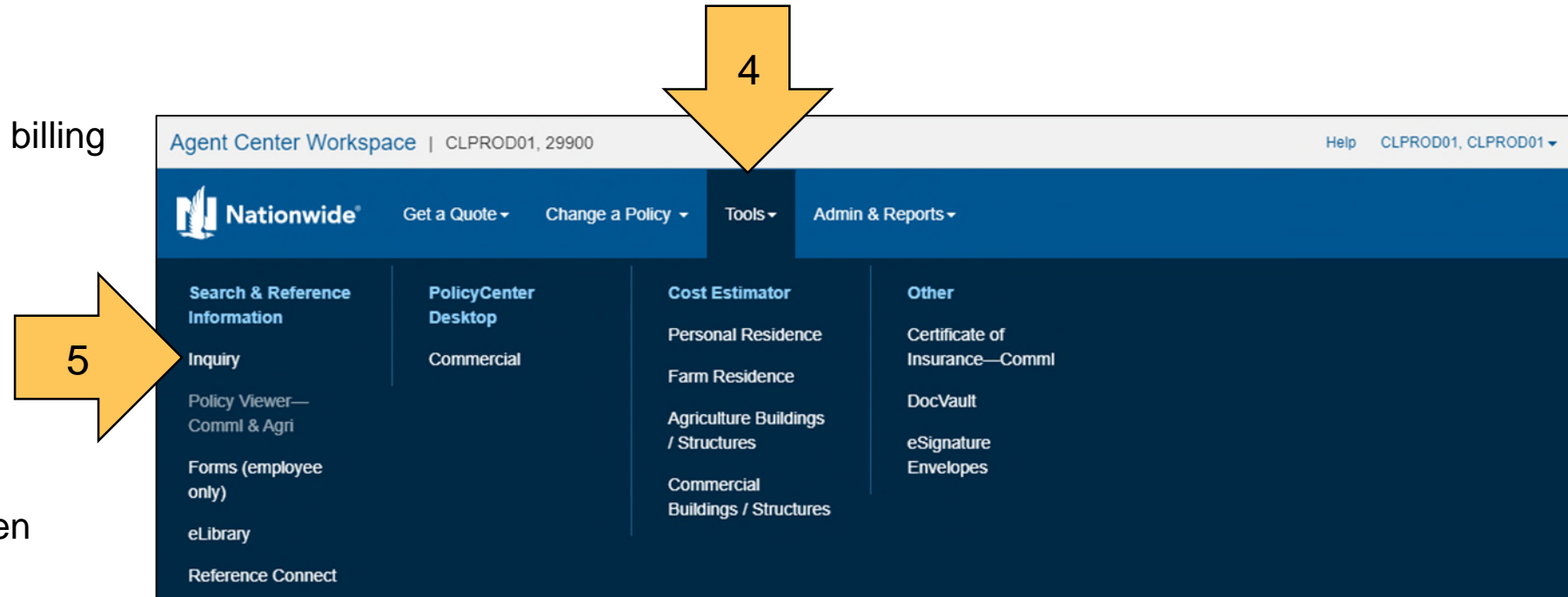


Search: Search for a client, policy, billing information, or claims.

4. Click on Tools.

5. Select Inquiry.

- Click the **Inquiry** link to open Policy Viewer.

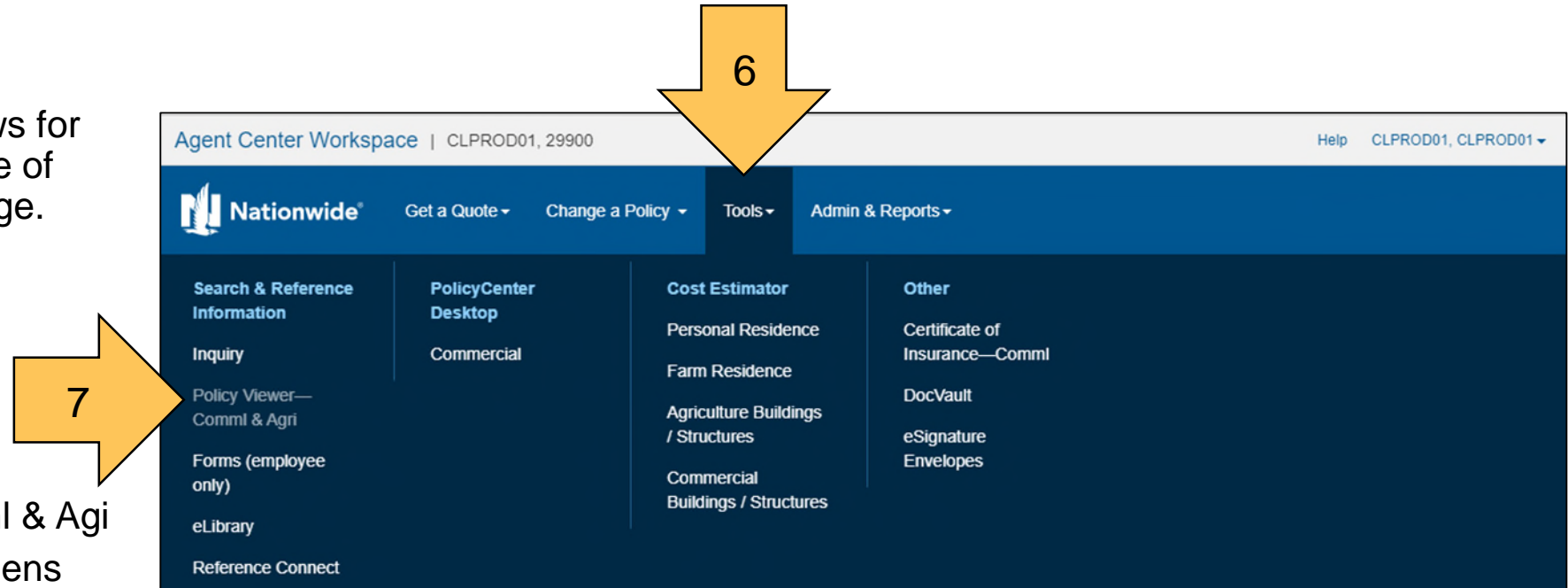


Search in Agent Center Workspace



NOTE: Clicking Policy Viewer allows for you to search by insured name, line of business, transaction and date range.

6. Click on Tools.
7. Select Policy Viewer – Comm1 & Agri
 - Selecting **Policy Viewer** opens up the Policy Viewer window.





NOTE: Opening Policy Viewer allows you view the agent and insured's copy.

8. Clicking on the **Policy Type** link opens the policy prints.
9. Clicking on **Policy Number** takes you PolicyCenter, if the policy is CLT.

Policy Viewer | ASK662, 04811 Help Close

Nationwide Search Billing ▾

Agent Copy Insured Copy

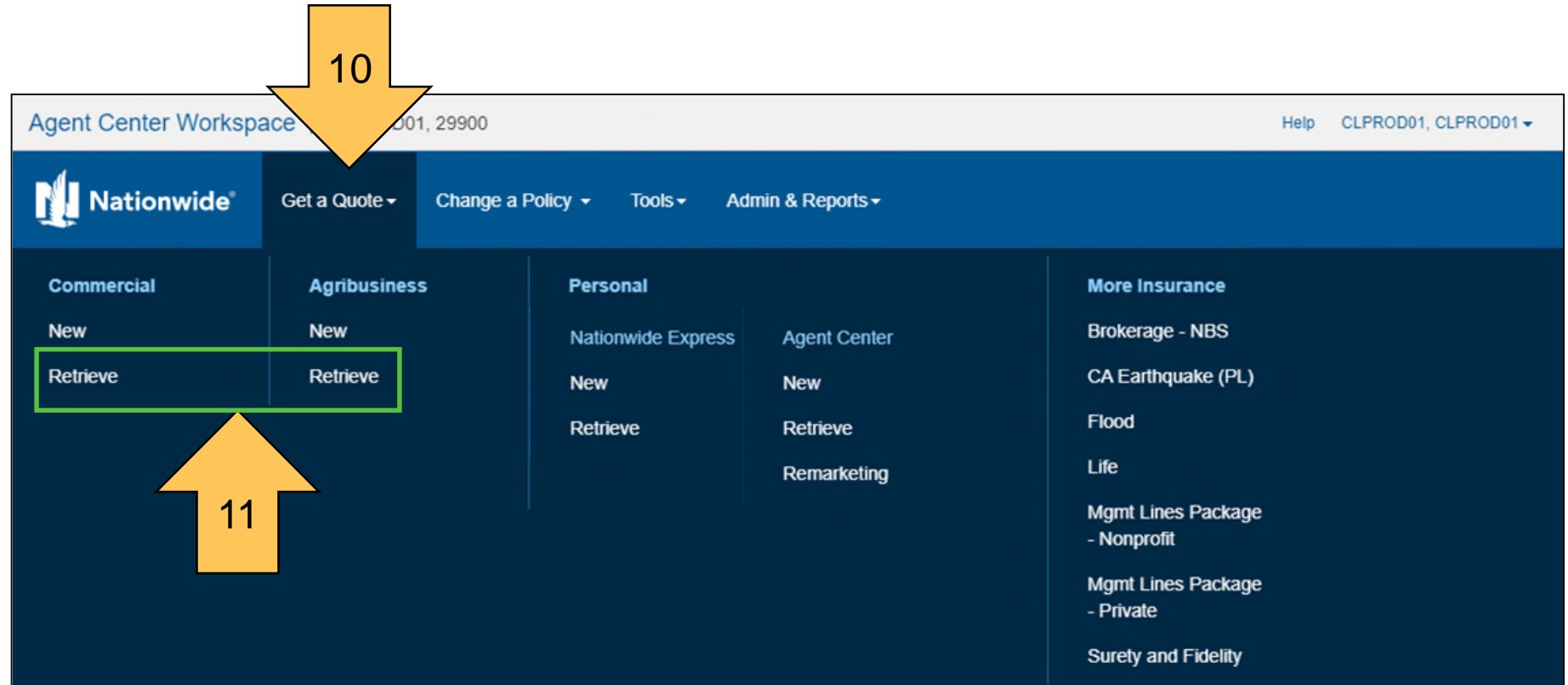
Insured Name Policy Type	Policy Number	Effective Date	Print Date	Transaction	Pages
Odm_90					
Package (PAK)	ACP 3801018194	11/04/2019	07/17/2018	Cancellation	2
Package (PAK)	ACP 3801018194	11/04/2019	07/03/2018	New Business	4
Package (PAK)	ACP 3801018194	11/04/2019	07/03/2018	New Business	4
Businessowners (BP)	ACP BP013801018194	11/04/2019	07/17/2018	Cancellation	2
Businessowners (BP)	ACP BP013801018194	11/04/2019	07/03/2018	New Business	134
Businessowners (BP)	ACP BP013801018194	11/04/2019	07/03/2018	New Business	134

Search in Agent Center Workspace



Search: Quoted Accounts

10. Click **Get a Quote**.
11. Click **Retrieve**.



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Note: On the **Quoted Accounts** tab you can search for accounts that are both PCIO and CLT.

12. **Quoted Accounts** tab defaults.

13. Use the **Refine List** to search for your account.

Comml/Farm Retrieve Account | CLPR001, 29900

Nationwide

Search Results

Refine List

Comml/Farm Account Number

Comml/Farm Account Type

Applicant Name Contains

City

State ZIP Code

Date Selection

From Date

To Date

Filter

Reset

Quoted Accounts **Current Accounts**

Search results for your accounts (includes all lines of business).

- Click on any sortable column heading to sort the results.
- All search results are for Quoted Accounts.

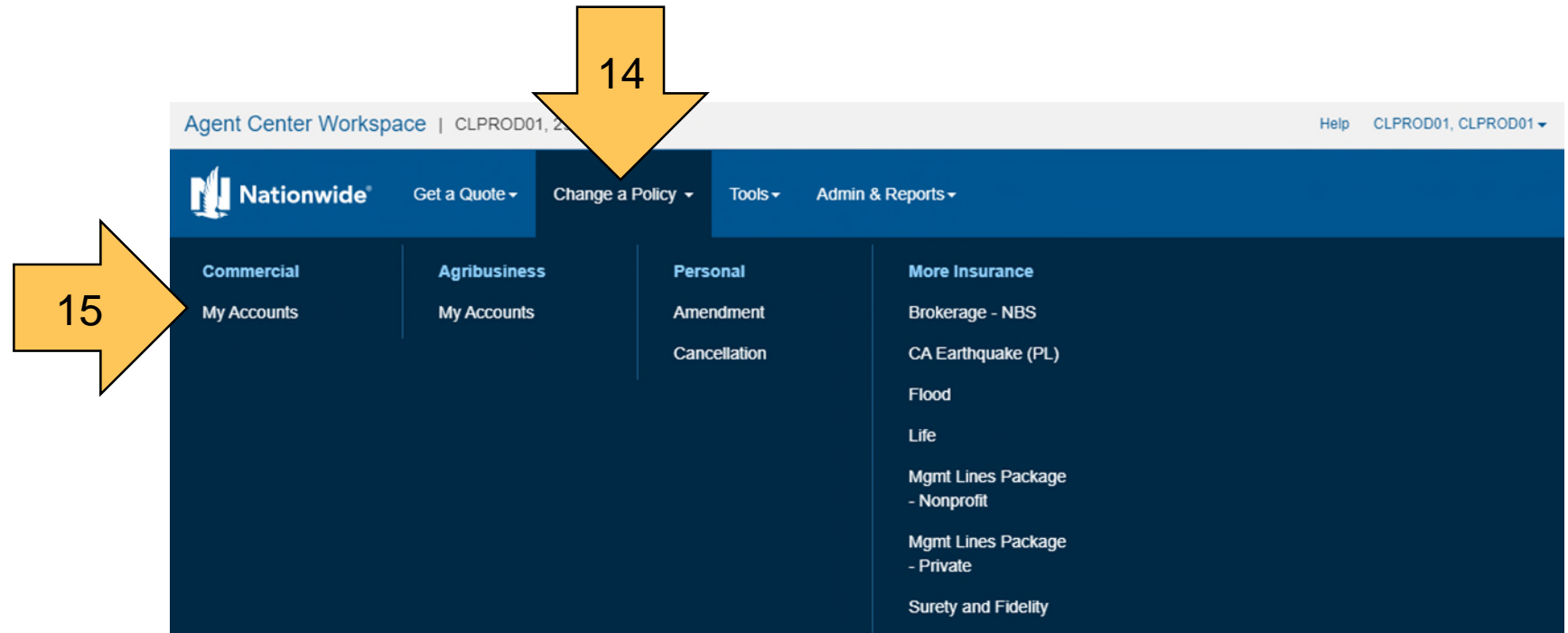
Viewing 1-20 of 24644

Applicant Name	Comml/Farm Account Number	Account Effective Date	Status	Premium	Agency Number
	ACP	02/01/2022	Reserved	\$0.00	00029900
	ACP	02/01/2022	Not Reserved	\$0.00	00029900
	ACP	01/21/2022	Not Reserved	\$591.00	00029900
NJ_Sample	ACP 3801010357	01/05/2022	Reserved	\$0.00	00029900
FORMS_NE	ACP 3801008431	01/03/2022	Reserved	\$986.00	00029900
	ACP	01/02/2022	Not Reserved	\$0.00	00029900
hkdbdub_31	ACP 3801010333	01/02/2022	Not Reserved	\$0.00	00029900
GL_Construction	ACP 3801010335	01/02/2022	Not Reserved	\$1,059.00	00029900
TC001_AUR_Rewrite	ACP 3801010336	01/02/2022	Reserved	\$0.00	00029900
GL Food	ACP 3801010338	01/02/2022	Not Reserved	\$1,136.00	00029900



Search: Current Accounts

14. Click Change a Policy.
15. Click My Accounts.



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Note: This search lands you on the **Current Accounts** tab. The Current Accounts tab displays accounts that have active policies that have been cancelled for no more than one year.

Depending where an account was created determines what information displays.

16. The **Current Accounts** tab defaults.

17. Use the **Refine List** to search for your account

Comm/Farm Retrieve Account | CLPROD01, 29900

Nationwide®

Search Results

Refine List

Comm/Farm Account Number

Comm/Farm Account Type

Applicant Name Contains

City

State ZIP Code

Date Selection ☒ Range ☐ Specific Date

From Date

To Date

Quoted Accounts **Current Accounts**

Search results for your accounts (includes all lines of business).

- Click on any sortable column heading to sort the results.
- All search results are for Current Accounts not in Pending Status.

Viewing 1-20 of 15355

Applicant Name	Comm/Farm Account Number	Account Effective Date	Status	Premium	Agency Number	Actions
	ACP	02/01/2022		\$2,454.43	00029900	Actions
NJ_Sample	ACP 3801010357	01/05/2022		\$2,361.08	00029900	Actions
FORMS_NE	ACP 3801008431	01/03/2022		\$564.00	00029900	Actions
TC001_AUR_Rewrite	ACP 3801010336	01/02/2022		\$3,449.76	00029900	Actions
	ACP	01/02/2022		\$904.13	00029900	Actions
TC001_AUR_FL_Renewal	ACP 3801010342	01/02/2022		\$852.44	00029900	Actions
TC002_AUR_FL_Renewal	ACP 3801010347	01/02/2022		\$754.44	00029900	Actions
alzmxsjdh_IADB4	ACP 3801010351	01/02/2022		\$695.70	00029900	Actions
Isksffkjsnc_IADB5	ACP 3801010367	01/02/2022		\$694.00	00029900	Actions
Alitz	ACP 3801010368	01/02/2022	Cancelled Insured's Request	\$0.00	00029900	Actions