



Description:

This step-by-step job aid describes how to utilize the copy data function. The *Copy Data* option is available during the Auto/PowerSports or Property Full Application Submission process, as well as during a change Policy Transaction. Copying data from an existing Policy, Policy Change, Renewal, or a Policy Transaction to a pending Submission or Policy Transaction saves time.

In these examples, the pending submission is augmented with data from another existing policy then copied over.

Click the link for the desired policy type:

- [Auto/PowerSports](#)
- [Property](#)

Copy Data for Auto/PowerSports Policies

Step 1

Action	Screen
<p>To start the copy process, open a pending Auto/PowerSports Full Submission OR start a new auto/PowerSports full submission.</p> <p>This is the new submission to which you will be copying data.</p> <p>On the <i>Policy Info</i> screen, complete all required fields prior to starting the copy process. This includes the following fields:</p> <ul style="list-style-type: none"> ○ Give Privacy, Credit Report and Insurance Score Notice? ○ Does the Customer consent to sharing their telematics data to be used in this quote? ○ Easy Pay Sign Up <p>Note: The Easy Pay Sign Up and Telematics data fields are required to be answered prior to starting the copy process. Easy Pay is not offered for PowerSports policies.</p>	

Job Aid Process (Auto/Powersports Cont.) :

Step 2

Action	Screen
<p>On the Policy Info screen:</p> <ul style="list-style-type: none"> Click the Actions button. Select “Copy Data” from the drop-down list. 	

Step 3

Action	Screen
<p>On the <i>Copy Policy Search Policies</i> screen, the Account Number field defaults to the account under which you started the quote.</p> <p>Note: The Search For drop down includes the options to copy data from a policy, policy change, renewal, or submission. Select the appropriate option based on your scenario.</p> <ul style="list-style-type: none"> Click the down arrow to the right of the Search For field. Choose “Policy” from the drop-down list. Click the Search button. 	

Step 4

Action	Screen
<p>In the <i>Search Results</i> section:</p> <ul style="list-style-type: none"> Locate the policy to be copied. Click the Select button. 	

Job Aid Process (Auto/Powersports Cont.) :

Step 5

Action	Screen
<p>On the <i>Select data to copy from Policy #XXXX</i> screen:</p> <ul style="list-style-type: none"> Select all driver(s), the appropriate vehicle(s), and any vehicle-level and/or policy-level coverages. You may need to scroll down on the page to view/select all coverages. Click the Merge to Transaction button. <p>Note: This only copies Driver, Vehicle, and Coverages; <i>all other policy information still must be entered in the new submission.</i></p>	

Step 6

Action	Screen
<p>The <i>Policy Info</i> screen re-displays. Proceed with the remainder of the submission.</p> <p>You still must complete all required fields on all screens to complete the submission. Refer to the <i>Create Auto Full Application</i> job aid for steps to complete a submission.</p> <p>Note: Items like Term Type and Usage-Based Information selections are not copied over from the existing policy.</p>	



Copy Data for Property Policies

Step 1

Action	Screen
<p>To start the copy process, open a pending Homeowner Full Submission OR start a new Homeowner full submission.</p> <p>This is the new submission to which you will be copying data.</p> <p>On the <i>Policy Info</i> screen, complete all required fields prior to starting the copy process. This includes the following fields:</p> <ul style="list-style-type: none"> ○ Have you previously been insured with Nationwide on a Homeowners, Tenant, or Condo Policy? ○ Give Privacy, Credit Report and Insurance Score Notice? ○ Years with Prior Carrier ○ Home and Car <p>Note: The Have you previously..., Years with Prior Carrier, and Home and Car fields are required to be answered prior to starting the copy</p>	<p>The screenshot shows the Policy Info screen in PolicyCenter. The left sidebar has 'Policy Info' selected. The main content area shows various fields for policy information. A green box highlights the following fields: 'Have you previously been insured with Nationwide on a Homeowners, Tenant, or Condo Policy?', 'Give Privacy, Credit Report and Insurance Score Notice?', 'Years With Prior Carrier', and 'Home and Car'. The 'Home and Car' field is set to 'NW Auto'.</p>

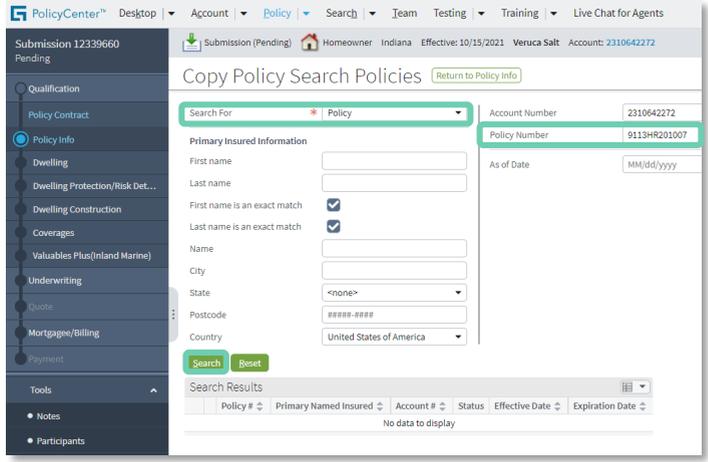
Step 2

Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> • Click the Actions button. • Select “Copy Data” from the drop-down list. 	<p>The screenshot shows the Policy Info screen with the 'Actions' menu open. The 'Copy Data' option is highlighted in a green box. The rest of the screen is identical to the previous screenshot.</p>

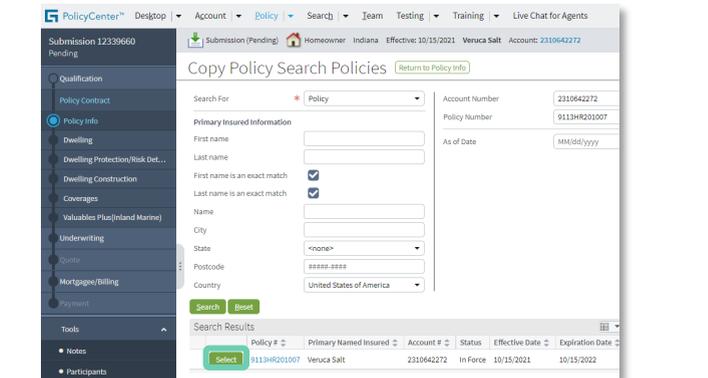


Job Aid Process (Property Cont.) :

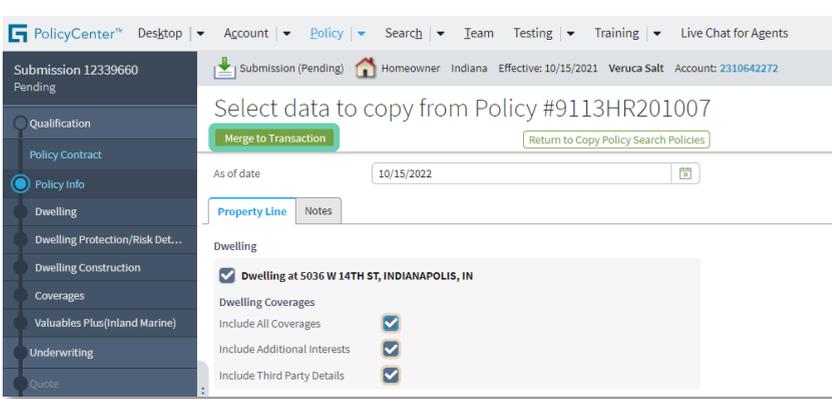
Step 3

Action	Screen
<p>On the <i>Copy Policy Search Policies</i> screen, the Account Number field defaults to the account under which you started the quote.</p> <p>Note: The Search For drop-down list includes the options to copy data from a policy, policy change, renewal, or submission. Select the appropriate option based on your scenario.</p> <ul style="list-style-type: none"> Click the down arrow to the right of the Search For field. Choose “Policy” from the drop-down list. Click the Search button. 	

Step 4

Action	Screen
<p>In the <i>Search Results</i> section:</p> <ul style="list-style-type: none"> Locate the policy to be copied. Click the Select button. 	

Step 5

Action	Screen
<p>On the <i>Select data to copy from Policy #XXXX</i> screen:</p> <ul style="list-style-type: none"> Select all dwelling coverages. You may need to scroll down on the page to view/select all coverages. Click the Merge to Transaction button. <p>Note: This only copies Coverages; <i>all other policy information still must be entered in the new submission.</i></p>	



Job Aid Process (Property Cont.) :

Step 6

Action	Screen
<p>The <i>Policy Info</i> screen re-displays. Proceed with the remainder of the submission.</p> <p>You still must complete <i>all</i> required fields on <i>all</i> screens to complete the submission. Refer to the <i>Create Auto Full Application</i> job aid for steps to complete a submission.</p> <p>Note: Items like Term Type and Usage-Based Information selections are not copied over from the existing policy.</p>	



By accepting a copy of these materials:

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- (2) I agree that the information contained in this training presentation is confidential and proprietary to Nationwide and may not be disclosed or provided to third parties without Nationwide's prior written consent.
- (3) I acknowledge that: (i) certain information contained in this training presentation may be applicable to licensed individuals only and access to this information should not be construed as permission to perform any functions that would require a license; and (ii) I am responsible for acting in accordance with all applicable laws and regulations.
- (4) I agree that I will return or destroy any material provided to me during this training, including any copies of such training material, when or if any of the following circumstances apply: (a) my Independent Sales Agent agreement with Nationwide is cancelled or I no longer hold any appointments with Nationwide; (b) my employment with or contract with a Nationwide Independent Sales Agent is terminated; (c) my Independent Adjuster contract with Nationwide is terminated; (d) my employment with or contract with a Nationwide Independent Adjuster is terminated; or (e) my employment or contract with Nationwide is terminated for any reason.