

Review and Compare Policy Transactions

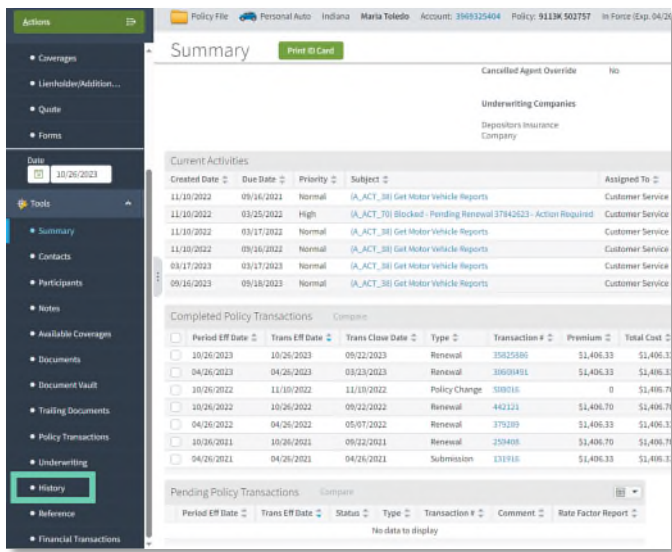


Description

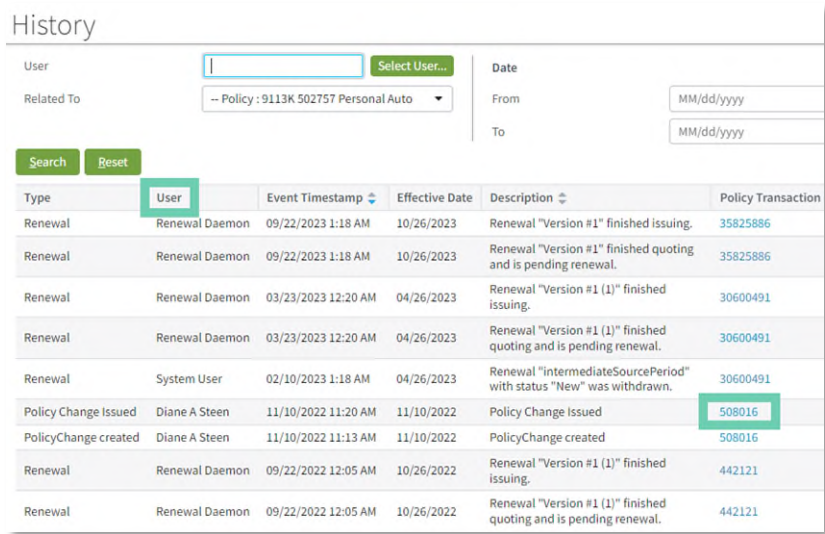
This job aid describes how to view Policy Transaction history on a policy, and review specific changes made within each transaction. This job aid also includes steps for comparing two Policy Transactions.

Review Policy Transactions

Step 1

Action	Screen
<p>On the Summary screen:</p> <ul style="list-style-type: none"> Select History from the Actions menu on the left. 	 <p>The screenshot shows the 'Summary' screen of a policy. On the left, the 'Actions' menu is visible with 'History' highlighted. The main content area shows 'Current Activities' and 'Completed Policy Transactions' tables. The 'Completed Policy Transactions' table has columns: Period Eff Date, Trans Eff Date, Trans Close Date, Type, Transaction #, Premium, and Total Cost. The 'History' button in the left menu is highlighted with a green box.</p>

Step 2

Action	Screen
<p>On the History screen, review the Policy Transactions on the policy:</p> <ul style="list-style-type: none"> Select the Policy Transaction # link to view the changes specific to that transaction. <p>Note: The User column has the name of the user who initiated the Policy Transaction.</p>	 <p>The screenshot shows the 'History' screen. At the top, there are filters for User, Related To, and Date. Below the filters is a table with columns: Type, User, Event Timestamp, Effective Date, Description, and Policy Transaction. The 'User' column is highlighted with a green box. The 'Policy Transaction' column contains links to transaction details. The 'Policy Change Issued' row is highlighted with a green box.</p>

Step 3

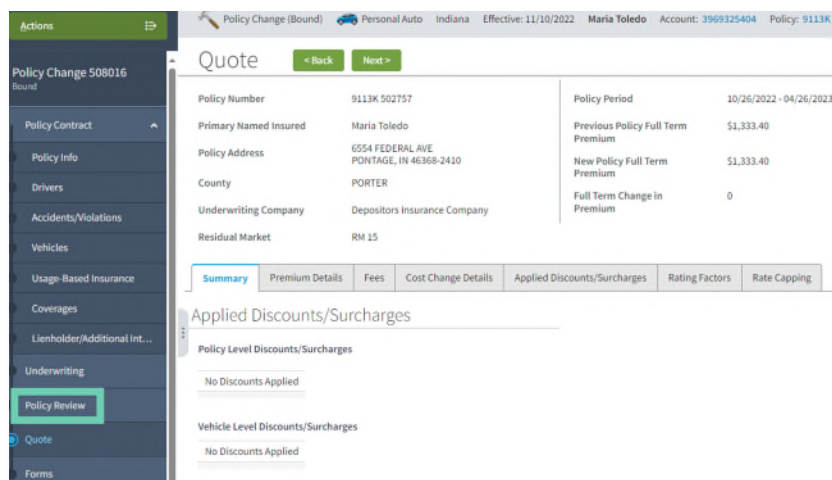
Action

The *Quote* screen displays the selected Policy Transaction.

To view more detailed information, go to the *Policy Review* screen.

- Select **Policy Review** from the **Actions** menu on the left.

Screen



The screenshot shows the 'Quote' screen for Policy Change 508016. The left sidebar contains a menu with 'Policy Review' highlighted. The main content area displays policy details for Policy Number 9113K 502757, Primary Named Insured Maria Toledo, and Policy Address 6554 FEDERAL AVE, PORTAGE, IN 46368-2410. The Policy Period is 10/26/2022 - 04/26/2023. The Previous Policy Full Term Premium is \$1,333.40, and the New Policy Full Term Premium is \$1,333.40. The Full Term Change in Premium is 0. The Residual Market is RM 15. The bottom section shows 'Applied Discounts/Surcharges' with 'No Discounts Applied' for both Policy Level and Vehicle Level.

Step 4

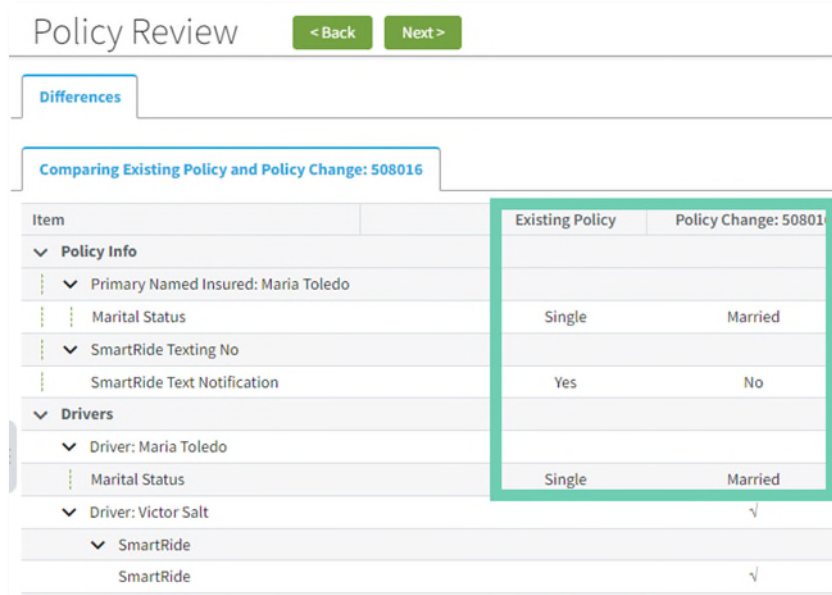
Action

On the *Policy Review* screen, you can review the differences by comparing the information in the **Existing Policy** and **Policy Change** columns.

It may be necessary to scroll down to view all the changes made on the policy.

Note: This screen displays different information depending on the policy type.

Screen



The screenshot shows the 'Policy Review' screen for Policy Change 508016. The left sidebar contains a menu with 'Policy Review' highlighted. The main content area displays a comparison of the Existing Policy and Policy Change 508016. The comparison table shows differences in Marital Status (Single vs. Married) and SmartRide Text Notification (Yes vs. No). The bottom section shows 'Applied Discounts/Surcharges' with 'No Discounts Applied' for both Policy Level and Vehicle Level.

Item	Existing Policy	Policy Change: 508016
Policy Info		
Primary Named Insured: Maria Toledo		
Marital Status	Single	Married
SmartRide Texting No		
SmartRide Text Notification	Yes	No
Drivers		
Driver: Maria Toledo		
Marital Status	Single	Married
Driver: Victor Salt		✓
SmartRide		
SmartRide		✓

Compare Policy Transactions

Step 1

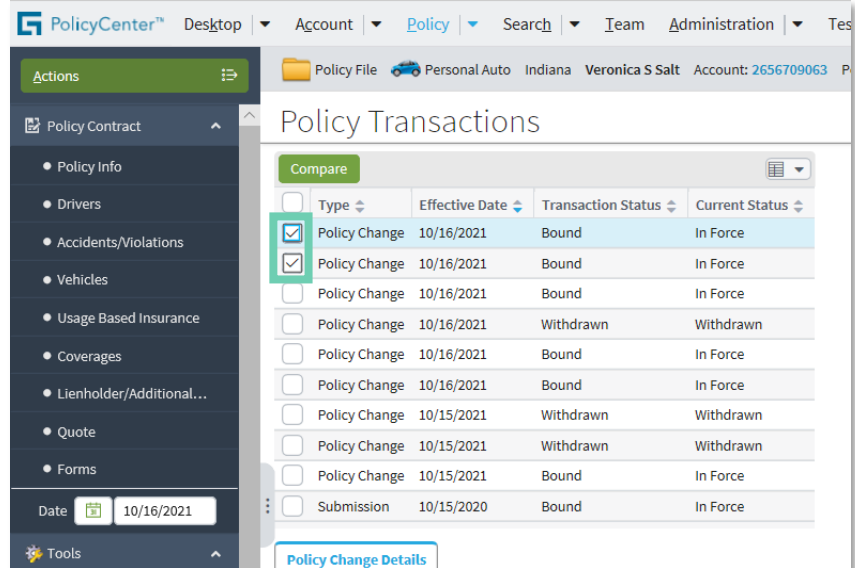
Action

From the *Policy Transactions* screen, you can compare two transactions.

You can review Policy Transaction details by clicking the arrow button to the left of the **Type** column.

- Select the checkbox to the left of the two Policy Transactions you would like to compare. In this example, select the checkboxes to the left of the **Policy Change** and **Reinstatement** Work Orders.
- Select the **Compare** button.

Screen



PolicyCenter Desktop | Account | Policy | Search | Team | Administration | Test

Policy File | Personal Auto | Indiana | Veronica S Salt | Account: 2656709063 | Policy: 91131 100080 | In Force (Expiration: 04/15/2022)

Policy Transactions

Compare

Type	Effective Date	Transaction Status	Current Status
<input checked="" type="checkbox"/> Policy Change	10/16/2021	Bound	In Force
<input checked="" type="checkbox"/> Policy Change	10/16/2021	Bound	In Force
<input type="checkbox"/> Policy Change	10/16/2021	Bound	In Force
<input type="checkbox"/> Policy Change	10/16/2021	Withdrawn	Withdrawn
<input type="checkbox"/> Policy Change	10/16/2021	Bound	In Force
<input type="checkbox"/> Policy Change	10/16/2021	Bound	In Force
<input type="checkbox"/> Policy Change	10/15/2021	Withdrawn	Withdrawn
<input type="checkbox"/> Policy Change	10/15/2021	Withdrawn	Withdrawn
<input type="checkbox"/> Policy Change	10/15/2021	Bound	In Force
<input type="checkbox"/> Submission	10/15/2020	Bound	In Force

Policy Change Details

Step 2

Action

The *Differences Between Pending Policy Transactions* screen displays the difference between the two Policy Transactions.

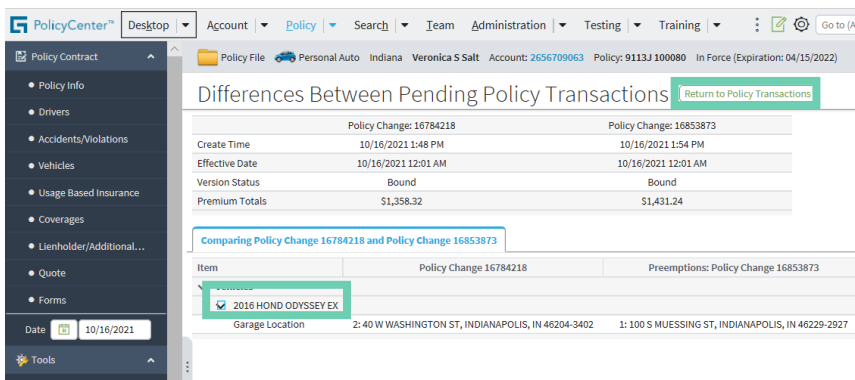
- Click the arrow to the left of **Vehicles** to see the detailed differences.

In this example, the Policy Change affected the premium amount.

Note: An "x" indicates the line item has been removed from the policy. A check mark indicates the line item has been added to the policy. (Not shown in this example.)

- Click the **Return to Policy Transactions** link to return to the *Policy Transactions* screen, where you can compare additional Policy Transactions, if desired.

Screen



PolicyCenter Desktop | Account | Policy | Search | Team | Administration | Testing | Training | Go to

Policy File | Personal Auto | Indiana | Veronica S Salt | Account: 2656709063 | Policy: 91131 100080 | In Force (Expiration: 04/15/2022)

Differences Between Pending Policy Transactions

Return to Policy Transactions

Item	Policy Change 16784218	Policy Change 16853873
Create Time	10/16/2021 1:48 PM	10/16/2021 1:54 PM
Effective Date	10/16/2021 12:01 AM	10/16/2021 12:01 AM
Version Status	Bound	Bound
Premium Totals	\$1,358.32	\$1,431.24

Comparing Policy Change 16784218 and Policy Change 16853873

Item	Policy Change 16784218	Policy Change 16853873
2016 HOND ODYSSEY EX		
Garage Location	2: 40 W WASHINGTON ST, INDIANAPOLIS, IN 46204-3402	1: 100 S MUENESSING ST, INDIANAPOLIS, IN 46229-2927

By accepting a copy of these materials:

- (1) I agree that I am either: (a) an employee or Contractor working for Nationwide Mutual Insurance Company or one of its affiliates or subsidiaries ("Nationwide"); or (b) an Independent Sales Agent who has a contract and valid appointment with Nationwide; or (c) an employee of or an independent contractor retained by an Independent Sales Agent; or (d) an Independent Adjuster who has a contract with Nationwide; or (e) an employee of or an independent contractor retained by an Independent Adjuster.
- (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.