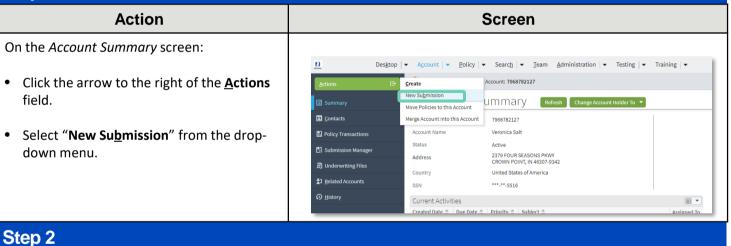
#### **Description:**

This job aid outlines the differences between Tenant and Homeowner submissions, as well as explains how to complete a Property Tenant full application submission in PolicyCenter.

#### Key differences from a Homeowner submission:

- •Different set of Qualification questions
- •No Marshall & Swift/Boeckh (MSB) launch
- No MSB data retrieved
- •No Inspection Data tab

### Step 1



#### Action Screen PolicyCenter defaults the Rate State to match Desktop | • Account | • Policy | • Search | • Team Administration | • Testing | • Training | • Ŭ. the prospective member's mailing address. New Submissions Select Producer PC Training Agency You can update the Default Effective Date on Organization Producer Code \* 130010258 Training Agent this screen or the Policy Info screen. Draduct Offere \* Indiana Rate State . Default Effective Date \* 02/26/2022 Select the radio button to the left of the Select oduct Name Product Description ronal Auto Private Passenger, Name Product Name Personal Auto Tenant field. Homeowner Homeowner Condominium Condominium Tenant Tenant • Click the **Select** button. Dwelling Fire Dwelling Fire Personal Umbrella Personal Liability Motorcycle and Off-Road Motorcycles, Snowmobiles, ATVs, Utility Trailer Pleasure Boatowners Boats, Personal Watercraft, Trailers Recreational Vehicle Motorhomes, Travel Trailers, Utility Trailer



## Job Aid Process (Cont.) :

### Step 3

#### Action

To begin the application, you must answer/verify the qualification questions. These questions are used to determine eligibility for the type of insurance being sought.

- Select the appropriate answer for each question.
- Click the **Next >** button.

#### Desktop | • Account | • Policy | • Search | • Team Administration | • Testing | • Training | • Ú La Submission (Pending) Submission 14002633 Qualification Next> Quote Withdraw Submission Currently living in the dwelling/apartment? • Yes No Any insured or household member been convicted of insurance fraud? Yes 💽 No Any insured or household member been convicted of a felony in the past 10 years? Yes 🔘 No Have you or any member of your household had a fire loss in the past 5 years at any property location that you owned or occupied at the time of loss? Yes 🔘 No Property accessible to fire equipment year round? No • Yes Is the dwelling rented to others as a vacation or short-term rental? Yes 🔘 No lling Protection/Risk Det vriting

Screen

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## Job Aid Process (Cont.) :

### Step 4



On the Policy Info screen:

- Select the Yes radio button to select the Give Privacy, Credit Report and Insurance Score Notice Disclosure option.
- Click the **OK** button on the pop-up window after reviewing the disclosure.

To complete the *Policy Info* screen:

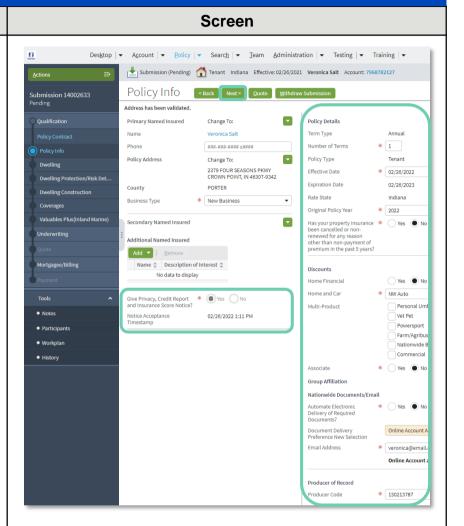
- Complete the remaining required fields. Those include:
  - o Business Type
  - o Number of Terms
  - Effective Dates
  - o Original Policy Year
  - o Insurance Cancellation radio button
  - Home and Car
  - o Associate radio button
  - Automate Electronic Delivery of Required Documents
  - o Email Address
  - o Producer Code

**Note**: Many of the required field's default but can be changed, as needed. You may need to scroll down to view additional fields.

Note: If you answer "Yes" to the Automate Electronic Delivery of Required Documents question, PolicyCenter will automatically send any required documents to the policyholder. To use this option, you MUST specify "Online Account Access" for Designated Delivery Preference New Selection and enter the policyholder's email address.

• Click the **Next >** button.

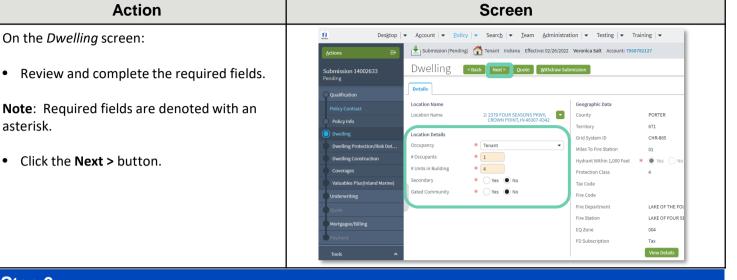
**Note:** Discounts can be added or updated in the *Discounts* section.





## Job Aid Process (Cont.) :

### Step 5



### Step 6

#### Action

On the *Dwelling Protection/Risk Details* screen:

 Review and update the answers, as necessary. For example, you may need to add information if the member has a home security system, swimming pool, trampoline, or dog on the premises.

	5	Screer	1		
Des <u>k</u> top	Account        ← Policy        ←	Searc <u>h</u> 💌 <u>T</u> ea	m <u>A</u> dministration –	Testing   🗸 Training   🗸	
<u>A</u> ctions ⋮∋	Submission (Pending)	👌 Tenant Indiana Efi	ective: 02/26/2022 Veronica	Salt Account: 7968782127	
Submission 14002633	Dwelling Prote	ction/Risk [	Details sack	Next > Quote Withdraw Sub	
	Dwelling Protection				
Qualification	Sprinkler System	<none></none>		•	
	Burglar Alarm	<none></none>		•	
	Fire/Smoke Alarm	<none></none>		•	
Dwelling	Dwelling Risk Details				
Dwelling Protection/Risk Det	Is there a swimming pool on *	Ves No			
Dwelling Construction	premises?	0.0			
Coverages	Is there a trampoline on the * premises?	Vies No			
Valuables Plus(Inland Marine)	Any dangerous or exotic * animals owned?	🔵 Yes 💿 No			
Underwriting	Do you currently own an * animal that has caused	🔵 Yes 💿 No			
Quote	injury ? Any dogs on premises? *	Yes No			

cidental Farm 🛛 🔹 🔿 No

Click the Next > button.

### Step 7

Action	Screen					
On the <i>Dwelling Construction</i> screen:	Desktop <ul> <li>Account</li> <li>Policy</li> <li>Search</li> <li>I eam</li> <li>Administration</li> <li>Testing</li> <li>Training</li> <li>Training</li> </ul> Actions					
<ul> <li>Ensure all required (*) fields are answered correctly.</li> </ul>	Submission 14002633     Dwelling Construction      Cluster     Outer     Withdraw Submission       Pending     Construction Type     * Encle, Stone or Masonry     •       Policy Contract     Roof Condition     * Excellent     •					
• Click the <b>Next &gt;</b> button.	Policy Info       Thermotatically Controlled * • Ves • No         Dewlling       Supplemental Heat         Powleng Protection/Risk Det       • Circuit Breaker         Dewlling Construction       Corcuit Breaker         Coverages       Valuables Plus(Inland Marme)         Underwrwing       •					
	Mortgagev/Billing Psyment.					



## Job Aid Process (Cont.) :

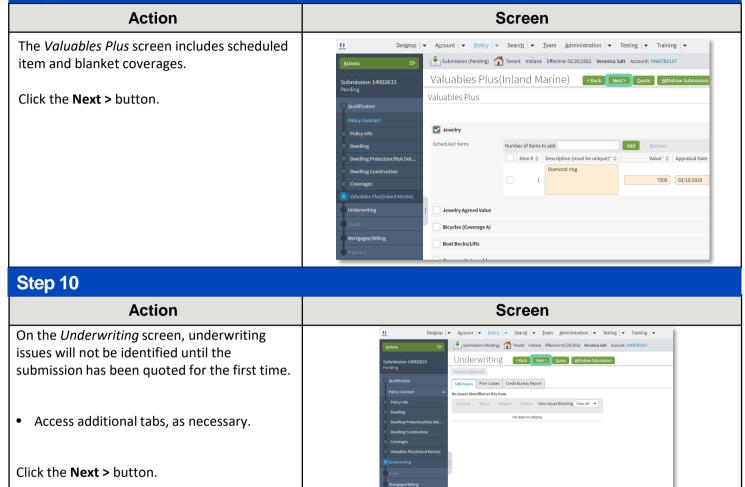
### Step 8

Action		Screen					
All Coverages are added on the <i>Coverages</i> screen. Refer to the chart below to see common additional coverages and their location on the screen.		Desgtop <ul> <li>Account</li> <li>Bolicy</li> <li>Search</li> <li>Tenant</li> <li>Indiana</li> <li>Effective: 02/26/2022</li> <li>Weronica Salt</li> <li>Account: 7968783127</li> </ul> Submission 14002633           Pending           Coverages           Coverages					
Item	Description	11       Desktop       • Account       • Exitivy       • Searchy       Team       Administration       • Testing       • Training         • Control       • Exitive       • Ex					
1	Brand New Belongings, Dwelling Replacement Cost	Develling Protection/Nish Det All Peril + 500					
2	Water Backup and Earthquake	Coverages     Limit * 15,000     Limit * 3,000					
3	Protection Boost (The <b>View</b> <b>Coverages</b> button displays all available coverages) and additional coverages for Tools	Outcommunity     All Risk Special Coverage Personal Property (All Peril)     Limit     300,000       Mostgage/billing     Image: Construction of the state of the st					
checkbo contrac	elds may default. Greyed-out oxes indicate coverages included in the t. Items not defaulted can be added or d per the customer's request.	Participanta     Workplan     Workplan     Workplan     With Table     Workplan     With Table     Workplan     With Table     Workplan     Wor					
fields of • Revi com	be necessary to scroll down to view all in the <i>Coverages</i> screen. ew the <i>Coverages</i> screen and plete all necessary information. It the <b>Next &gt;</b> button.	Desktop Account   Actions   Submission (Pending)   Submission 14002633   Pending   Qualification   Policy Contract   Policy Contract   Policy Info   Dwelling   Desktop   Section I Deductibles   All Peril   All Peril   Prosonal Property     Medical Payments to Others					
		Personal Property Medical Payments to Others					



## Job Aid Process (Cont.) :

### Step 9



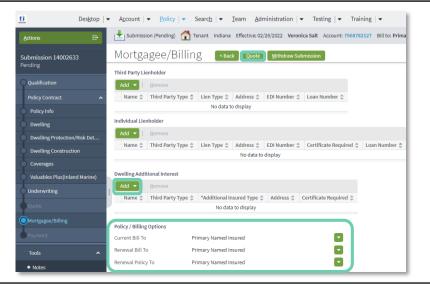
### Step 11

#### Action

On the *Mortgagee/Billing* screen in the *Policy/Billing Options* section, you can determine the billing for New Business and Renewals. For tenant policies, billing is sent to the Primary Named Insured.

If your customer needs a copy sent to their landlord or property management company, you will enter that information under *Dwelling Additional Interest.* 

- Complete all necessary information.
- Click the **Quote** button.



Screen



## Job Aid Process (Cont.) :

## Step 12

Action	Screen					
<ul> <li>The <i>Quote</i> screen provides a detailed breakdown of premium cost for each policy coverage.</li> <li>Click the <b>Finalize Quote</b> button.</li> <li>Click the <b>OK</b> button on the <i>Finalize Quote</i> popup window after reviewing the disclosure statement.</li> <li>Note: Clicking the <b>Finalize Quote</b> button places the submission in Binding status. After binding the policy, you can advance to the <i>Payment</i> screen, enter the billing information, and issue the policy.</li> </ul>	Besktop      Account      Bolicy      Search      I eam Administration      Testing      Training					
Step 13						
Action	Screen					
The system displays a progress bar as a visual cue of running validations report ordering. Once validations are complete, the system automatically displays the <i>Payment</i> screen. <b>Note:</b> If a validation or report fails, PolicyCenter continues to display a validation message, warning, or Underwriting rule on the impacted	Desistop        Account        Desistop        Desistop					

### Step 14

screen.

Action	Screen					
On the <i>Payment</i> screen:	11 Desktop   ▼ Account   ▼ Policy   ▼ Search   ▼ Team Administration   ▼ Testing   ▼ Training   ▼ Actions ::::::::::::::::::::::::::::::::::::					
• Select the appropriate <b>Installment Plan</b> .	Submission 14002633 Payment <back edit="" exceptions<="" td=""></back>					
• Complete the required information. Those fields include:	Qualification     Total Premium     \$244.70       Policy Contract     Frees     0       Policy Info     Taxes and Surcharges     0       Dwelling Protection/Risk Det     Total Cost     \$244.70					
<ul> <li>Day of Month (defaults to submission's effective date)</li> <li>Bill Delivery Preference radio button</li> </ul>	Dwelling Construction     Billing A       Coverage     Billing Acount       Valuables Plac(Inland Marrine)     Billing Address       Change To:     2379 FOUR SEASONS PKWY, CROWN POINT, IN 44307-8342					
<ul> <li>Paperless Billing Consent radio button</li> </ul>	Quote     Payment Schedule       Mortgagev/Billing     Installment Plan       Installment Plan     Select the payment to be					
Click the Issue Policy button.	Notes     Day of Month     26     Devinente     Devinente     Devinente					
<ul> <li>Click <b>OK</b> on the confirmation pop-up window.</li> </ul>	Coccinitints     Paperless Billing Consent     Participants     Workglan     Vorkglan     Consent Optimise Texail Receipt for Payments     Consent Texail Receipt					



Job Aid Process (Cont.) :						
Step 15						
Action	Screen					
<ul> <li>The Policy is now in <i>"Bound"</i> status.</li> <li>Next, complete the <i>Down Payment Details</i> information:</li> <li>Click the <b>Add</b> button.</li> </ul>	Morgagev/Biling     Mobile Phone     Bank Card       Mobile Phone     Bank Card       Tools     Image: Cash Check Install Down Payment     Check Install Down Payment       Nodes     Autiable Coverages     Total Submitted       Down Payments     S 25.39     Check Install Down Payment       Down Payment Details (Agency Sweep/Web Remittance will be used for Cash, Check and Money Order)     Add        Down Payments     Down Payment Details (Agency Sweep/Web Remittance will be used for Cash, Check and Money Order)       Participands     No data to display					
• Select " <b>Cash"</b> from the drop-down list.						
Step 16						
Action	Screen					
<ul> <li>In the <i>Down Payment Details</i> section:</li> <li>Enter the amount of the down payment.</li> <li>Click the <b>Submit Payment</b> button.</li> <li>Note: Depending on which Down Payment option</li> </ul>	Underwitting     moder Finite       Coole     Initial Coun Payment       Forms     Total Submitted       Stabilities     S25.39       Down Payment     S25.39       Down Payment     S25.39       Down Payment     Submitted       Total Submitted     S25.39       Down Payment     Submitted       Total Submitted     S25.39       Down Payment     Submitted       Payment     Submitted       Cash     S25.39       Power     Submitted       Cash     S25.39       Power     Submitted       Payment     Submitted       Submitted     S25.39       Power     Submitted       Submitted     S25.39       Payment Details     S25.39       Power     Submitted       Payment Details     S25.39					
is selected, additional information may be required. Step 17	Documents     Participands     Amount     * S 25.39					
Action	Screen					
The <i>Submission Bound</i> screen displays. Next, you must collect the documents required to complete the bind process:	Des <u>k</u> top   ← Account   ← <u>Policy</u>   ← Searc <u>h</u>   ← Ieam Administration   ← Testing   ← Training   ← Submission (Bound) 🏠 Tenant Indiana Effective: 02/26/2022 Veronica Sait Account: 7966782127 Policy: 9113HS Submission Bound					

Documents defaulting on the Documents screen are those required to finish the issuing process. This includes documents needing

signatures or additional documentation from the customer. An example of this would be the Central Alarm Certificate.

Additional documents can be found by clicking on the Add button. These documents are optional but are available for the

There are two ways to obtain the customer's signature. They can physically sign printed documents (click the View button to

If you selected "Yes" for the Automate Electronic Delivery of Required Documents question on the *Policy Info* screen, required documents will show as already sent for eSignature when you display the *Documents* screen. If this is the case, you will only need to

Your Submission (#14002633) has been bound. Billing Account Number:9182288798

• View your submiss

Documents
 Submit an applicat
 Go to your desktop

View your policy (#9113HS900001)
Go to the submission manager for this are

on (#14002633)

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customer. An example of this would be a down payment receipt.

generate a PDF) or electronically sign documents online using eSignature.

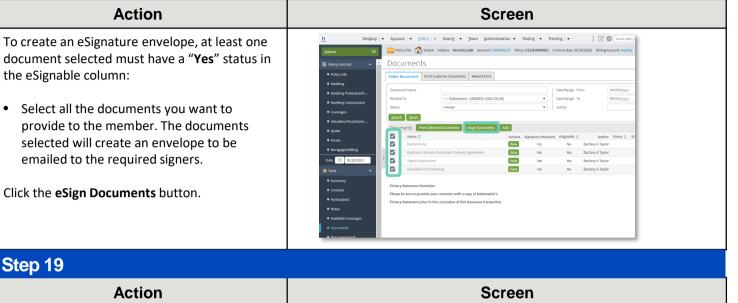
Click on the Documents link.

eSign any optional or added documents.



## Job Aid Process (Cont.) :

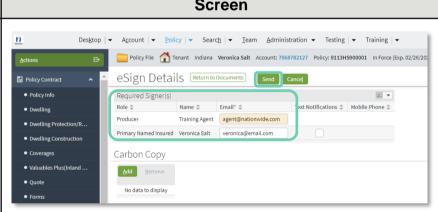
### Step 18



Enter or verify email address(s) for required signers. You can also add **Carbon Copy** recipients not requiring a signature:

• Click the Send button.

An email is sent to all recipients to take appropriate action using the eSignature functionality.



### Step 20

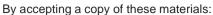
#### Action

PolicyCenter produces a second set of documents during the eSignature envelope creation process. The second set of documents includes signatures once the process is completed. The first set never includes signatures at any point.

The second set of documents display a "Created" Status until all documents are created by the system; this is about a 10-minute process. At that point, the documents are emailed and the Status changes to "Sent". The Status column will update to "Completed" after the envelope is signed and returned.

Actions ID+	Policy File 🚮 Terr	indiana Verenica Salt Account: 790	1712127 P	olicy: 9113HS900001	In Force (Exp. 0	2(26,2(23) Billing	Account: M	tequir
PolicyContract A	Documents							
· Policy info	Online Documents Print	t Customer Documents Resend Print						
Dwelling	· · · · · ·							
Dwelling Protection/R	Document Name				Oata Ranga - From		MM(dd/yyyyy	
Dweiling Construction	Related To	Submittion : 14003433 (2003-02-34)		Dato Range - To		NN/ISC/yyyy		
· Coverages	Status	<tana></tana>		•	Author			
Valuables PlusOnland	Search Benet							
	Documents Prints		AN	Hanage Envelopes				
Quote	Name 2		Actions		etienable ::	Author	Status 2	0
Forms	Declarations			No	No	Zachary A Taylor		
Montgagese/Billing	Declarations	Declarations		No	No	Zachary A Taylor	Sent	90
Date [2] #2/26/2502	Electronic Services Document Delivery Agreement		Ment	Yes	Yes.	Zachary A Taylor		
_	Electronic Service	Electronic Services Document Delivery Agreement		745	Yes	Zachary A Taylor	Sent	
🏚 Tools 🔷 🗠	Signat Applicatio	signet Application		Yes	Yes	Zachary A Taylor		
<ul> <li>Summary</li> </ul>	Signed Applicatio	Signed Application		Yes	Yes	Zachary A Taylor	Sent	N
Contacts	Valuables Plus Sc	Valuables Plus Schedule		No	No	Zachary A Taylor		
Participants	valuables Plus Sc	Valuables Plus Schedule		No	760	Zachary A Taylor	Sent	86
· Notes								
Available Coverages	Privacy Statement Remin							
	Please be sure to provide	your customer with a copy of Nationwide's						

Screen



(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 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.

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