Description

PolicyCenter Auto reports are automatically ordered, at specific times, during the quoting and issuing process. Report information is available on different tabs on the "Underwriting" screen. Business rules for managing risk determine *when* and *how often* reports are ordered and whether they can be re-ordered.

This job aid reviews each of the reports and/or tabs on the "Underwriting" screen. This also includes steps on re-ordering reports when applicable.

Select the link to advance to the desired topic

- Enterprise Validation Technology (EVT) Alerts
- Prior Policies (Current Carrier) Information
- <u>Auto Loss History (ALH) Report</u>
- <u>Credit Bureau Report (CBR)</u>
- Motor Vehicle Report (MVR)
 - Scenario 1: MVR returns successfully, mating information entered on submission
 - Scenario 2: MVR returns, but with validation messages requiring Agent review
 - Scenario 3: MVR was not returned, driver information needs reviewed

Auto Report Ordering (2 of 16)



Enterprise Validation Technology (EVT) Alerts

Step 1

Action

The "UW Issues" tab displays on the "Underwriting" screen when an alert has been identified by the system.

The EVT Alert helps to identify potential fraud, prior to binding a policy. This helps reduce the risk of early-term losses. At the time of issue, policy data must pass validation. If validation fails, PolicyCenter sends an alert.

Multiple alerts can be triggered on a single policy.

PolicyCenter [™] Des <u>k</u> top	o ▼ Account ▼ Policy ▼ Search ▼ Team : O Go to (Alt+/)
<u>A</u> ctions ⋮∋	Submission (Pending) 🚓 Personal Auto Indiana Effective: 11/12/2021 Account:
ubmission	Underwriting Stack Quote Withdraw Submission
ending	Request Approval
Policy Contract	UW Issue Alerts Prior Policies Prior Losses Credit Bureau Report Motor Vehicle Records
Policy Info	
Drivers	Approve Reject Reopen History View Issues Blocking View All
Accidents/Violations	IM002 The SS# for driver, belongs to a deceased
Vehicles	individual. Do not release with deceased or invalid SS#. [].
Usage-Based Insurance	Trailing Document: Auto Application with Privacy Statement (61) [Agent]
Coverages	Trailing Document: Electronic Services Document Delivery Agreement
Lienholder/Additional Interest	(Q9) [Agent]

Screen

• Select the "Alerts" tab.

Step 2

Action

On the "Alerts" tab, a description of the EVT issue displays.

In this example, there is an issue with the driver's Social Security Number.

The "Reply" field provides space for notes to/from the Agent concerning the alert.

Some alerts require an entry in the "Reply" field. For example, if an EVT call finds a policy was canceled with a balance due, an entry in the "Reply" field is required. Additionally, a post-bind Activity is sent to the Associate Underwriting group.

Important Note: If an alert requires you to request approval from Underwriting, you can select the "Request Approval" button and submit a request for Underwriting approval.

F PolicyCenter™ Desktop | ▼ : 📝 💿 Go to (Alt+/) Account | • Policy | • Search | • Team Submission (Pending) 💏 Personal Auto Indiana Effective: 11/12/2021 Account: Underwriting < Back Quote Withdraw Submission Request Approval Policy Contract UW Issues Alerts Prior Policies Prior Losses Credit Bureau Report Motor Vehicle Records Report Ordering Status Received Refresh Alerts I Accidents/Violation Message = Reply IM002 The SS# for driver. belongs to a deceased individual. Do not release with deceased or invalid SS#. Usage-Based Insurance Alerts The Social Security Administration has responded that the Social Security Number entered belongs to a deceased person or thre has been a death claim filed against that Social Security Number. Please correct the Social Security Number or remove the driver. Description Message Lienholder/Additional In Reply

Screen

Auto Report Ordering (3 of 16)



Prior Policies (Current Carrier) Information

Step 1

The **Prior Policies** tab displays the prior carrier information returned from the Current Carrier/CLUE Report. The CLUE report is automatically ordered after vehicles are entered on the "Vehicles" screen.

If the Current Carrier/Clue report does not return, then enter the correct prior policy information in the required fields.

Important Note: You may either encounter an underwriting block or be required to submit proof of prior coverage during the policy issuance process.

PolicyCenter" Desktop	Account Policy	 Search 	• <u>T</u> eam <u>A</u> d	ministration 🛛 🕶 Te	sting	Training
Actions 😥	Submission (Pending)	🥽 Personal Au	uto Indiana Effec	tive: 12/03/2021 Primar	y:	Account:
ubmission	Underwriting			< Back	Quote	Withdraw Submissio
ending	Request Approval					
Policy Contract	UW Issues Prior Policies	Prior Losses	Credit Bureau Rep	ort Motor Vehicle Reco	ords	
Policy Info	Re-order Current Carrier Rep	ort				
Drivers		_				
Accidents/Violations	Prior Policies					
Vehicles	Primary Named Insured	Date Ordered	Date Received F	Report Ordering Status	Status	Reference Numb
Usage-Based Insurance		12/03/2021	12/03/2021 P	received	HIL	
Coverages						
Lienholder/Additional Interest		(
	Carrior	ALLSTATE			•	
Underwriting	Carrier					
Underwriting	: Liability Limits	Greater tha	in or equal to 100/30	0 (CSL >=250)	•	
Underwriting Quote	Liability Limits	Greater tha 0 days	n or equal to 100/30	0 (CSL >=250)	•	
Underwriting Quote Payment	Liability Limits Lapse in Coverage Policy #	Greater tha	n or equal to 100/30	0 (CSL >=250)	•	
Underwriting Quote Payment Tools	Liability Limits Lapse in Coverage Policy # Inception Date	Greater tha 0 days 12/23/2018	in or equal to 100/30	0 (CSL ≻=250)	• • •	
Underwriting Ruote Payment Tools ^ • Notes	Liability Limits Lapse in Coverage Policy # Inception Date Expiration Date	Greater tha 0 days 12/23/2018 12/23/2022	in or equal to 100/30	0 (CSL>=250)	• • • •	
Underwriting Quote Payment Tools • Notes • Participants	Liability Limits Lapse in Coverage Policy # Inception Date Expiration Date Terms With Current Carrier	Greater tha 0 days 12/23/2018 12/23/2022 3	in or equal to 100/30	0 (CSL>=250)	• •	



Auto Loss History (ALH) Report

PolicyCenter orders the Auto Loss History (ALH/CLUE) at the time of issuance for a new submission.

Step 1

Action

The "Prior Losses" tab displays ALH/CLUE report information.

- To access the full report, select the link in the "Reference Number" column.
- To re-order the report, select the "Re-Order Auto Loss History Report" button. The button is only enabled for new submissions. You cannot re-order the ALH report for an "In Force" policy.

PolicyCenter" Desktop	 Account 	▪ <u>P</u> olicy ▼	Searc <u>h</u> 💌 <u>T</u> e	am <u>A</u> dministr	ration 🛛 🕶 Testing 🖃 🕇	Training -
	Submissio	on (Pending) 🥽	Personal Auto Ind	iana Effective: 12/	03/2021 Primary:	Account:
Submissior	Underv	vriting			< Back Quote Y	vithdraw Submissior
Pending	Request Approv	val				
Policy Contract	UW Issues F	Prior Policies Pri	ior Losses Credit	Bureau Report	Aotor Vehicle Records	
Policy Info						-
	Re-Order Auto	Loss History Repor				E E
Drivers	Re-Order Auto	Loss History Repor	Date Ordered 😄	Date Received	Report Ordering Status 🖨	Reference Numb
Drivers Accidents/Violations	Re-Order Auto	Loss History Repor	Date Ordered 12/03/2021	Date Received : 12/03/2021	Report Ordering Status Received	Reference Numb
Drivers Accidents/Violations Vehicles	Driver Name	Loss History Repor	Date Ordered 12/03/2021	Date Received : 12/03/2021	Report Ordering Status Received	Reference Numb
Drivers Accidents/Violations Vehicles Usage-Based Insurance	Claim Type 🖨	Amount Paid \$	t Date Ordered 12/03/2021 Status	Date Received (12/03/2021	Report Ordering Status Received	Reference Numb
Drivers Accidents/Violations Vehicles Usage-Based Insurance	Claim Type 🖨	Amount Paid 🖨	Date Ordered 12/03/2021 Status C	Date Received 4	Report Ordering Status Received	Reference Numb
Drivers Accidents/Violations Vehicles Usage Based Insurance Coverages	Claim Type \$	Amount Paid \$ 33,199.00	t Date Ordered ≎ 12/03/2021 Status ≎ C C	Date Received 4	C Report Ordering Status C Received	Reference Numb

C

Step 2

Action	Screen
On the "Auto Loss History Report" screen:	PolicyCenter [®] Desktop V Account V Policy V Search V Ieam Administration V Testing V Training V
 Review the "Report Summary" tab information of the ALH report. Select the "Vehicle Information" tab. 	Submission Personal Auto Indiana Effective: 12/03/2021 Primary: Account: Pending Auto Loss History Report Return to Underwriting Policy Contract Report Summary Vehicle Information Claims Drivers Report Summary Account Report Date 12/03/2021 Vehicles Reference # Iteration Iteration Iteration
	CORPS Report ID CORPS Report ID Utenholder/Additional Interest Curde Curde Curde Payment.
	Tools , CROWNE POINT, IN 46224-3592 • Notes Date of Birth • Participants Gender • History SSN
	License #1 IN-

Auto Report Ordering (5 of 16)

Auto Loss History (ALH) Report, continued

Step 3

Action	Screen
 On the "Vehicle Information" tab: Review the "Vehicle Information" returned from the ALH report. Select the "Claims" tab. 	PolicyCenter** Desktop Account Policy Search Ieam Administration Testing Training Submission Pending Submission (Pending) Personal Auto Indiana Effective: 12/03/2021 Primary: Account: Policy Contract Auto Loss History Report Return to Underwriting Report Summary Vehicle Information Vehicles Vehicle Information Vehicle Information Vehicle ID # Vehicle Description Usage-Based Insurance Coverages Lienholder/Additional Interest Vehicle Description
Step 4	
Action	Screen
On the "Claims" tab: • Review the "Claims" tab information returned from the ALH report.	PolicyCenter [™] Desktop Account Policy Submission Pending Submission Pending Submission Pending Personal Auto Indiana Effective: 12/03/2021 Primary: Account: Pending Personal Auto Indiana Effective: 12/03/2021 Primary: Account: Policy tinfo Policy tinfo Policy tinfo Claims Claims Claims Claims Vehicle 0 perator 1; Vehicle 1; Policy tono Policy Holder Claim Date 1; Policy Holder/Additional Interest Policy Holder Vehicle 0 perator Policy Holder Policy Holder Policy Holder Policy Holder Policy Holder/Additional Interest Policy Holder Policy Holder Policy Holder Policy Holder Policy Type PA Vehicle 02 Thu Dec 02 00:00:00 EDT 2021 Policy Type PA Claim Date 12/03/2021 Policy Type PA Vehicle 10 # Vehicle 10 # Policy Type PA Claim S Claim Type 2; Status 2; Amount Paid 2; # Policy Colico

Auto Report Ordering (6 of 16)



Credit Bureau Report (CBR)

Step 1

Action	Screen
PolicyCenter orders a Credit Bureau Report (CBR) upon the customer's acceptance of the Fair Credit Reporting Act (FCRA) notification. To ensure the report was successfully returned, check the "Credit Bureau Report" tab on the "Underwriting" screen: • Select the "Credit Bureau Report" tab.	PolicyCenter Desktop Actions Submission Submission Pending Pending Policy Contract UW Issues Policy Info Drivers Accidents/Violations Vehicles Usage-Based Insurance Coverages Lienholder/Additional Interest
0(+++0)	

Step 2

Action

If the status is "No Hit", you will want to confirm the information entered is correct.

For example, a "No Hit" status may be returned if the potential member just moved or has recently changed their last name. In this case, you will need to reorder the credit report, after updating to the "previous" information.

Agents can re-order a CBR, only if the original report returns a "No Hit" status.

In this example, you will re-order the credit report using the policyholder's previous address.

• Select the checkbox to the left of the "Driver Name" field.



Auto Report Ordering (7 of 16)



Credit Bureau Report (CBR), continued

Step 3

Action	Screen						
On the "Credit Bureau Report" tab:	FolicyCenter™ Desktop ▼ Account ▼ Policy ▼ Search ▼ Ieam Administration ▼ Testing ▼ Training ▼						
 Select the "Re-Order Credit Bureau Report" button. 	Actions 😝 📩 Submission (Pending) 🚗 Personal Auto Indiana Effective: 12/03/2021 Primary: Account:						
	Submission Underwriting <back approval<="" pending="" quote="" request="" submission="" td="" withdraw=""></back>						
	Policy Contract UW Issues Prior Policies Prior Losses Credit Bureau Report Motor Vehicle Records Policy Info Policy Level Attributes Policy Level Attributes Vendor Return Date 12/03/2021						
	Accidents/Molations Policy Effective Date 12/03/2021 Vehicles Number of Shopping Days 0 Usage-Based Insurance Financial Stability Class						
	Coverages Re-Order Credit Bureau Report Lienholder/Additional Interest #						
	Quote Name on Report Financial Stability Class Prayment. Date of Birth Financial Stability Class						

Step 4

Action

The "Re-Order Credit Bureau Report" screen displays data for the driver selected.

You can update information on this screen. For example, it may be necessary to update an address, if the member has recently moved. Updating to a previous address may return a valid credit report.

- Update the address.
- Select the "OK" button.

Important Note: "Update Contact" should only be selected if you are correcting member information that needs to be updated on the entire account.

Do not select "Update Contact" if you are re-ordering credit with the previous last name.



Auto Report Ordering (8 of 16)



Credit Bureau Report (CBR), continued

Step 5

Action	Screen
The CBR "Status" for the potential policyholder has updated from "No Hit" to "Hit".	PolicyCenter* Desktop Account golicy Search Ieam Administration Testing Training Actions ip Submission Pending Personal Auto Indiana Effective: 12/03/2021 Primary: Account: UnderWriting Back Quote Withdraw Submission Policy Contract UW Issues Prior Policle Prior Policy Contract Withdraw Submission Policy Contract UW Issues Prior Policle Prior Policy Contract Withdraw Submission Policy Level Attributes Vendor Return Date 12/03/2021 Notor Vehicle Records Policy Effective Date 12/03/2021 Number of Shopping Days 0 Financial Stability Class Coverages Recorder Credit Bureau Report Image: Prior Policy Effective Date Underwriting 1 Received 06/03/2021 06/03/2021 Outder 1 Received 06/03/2021 Name on Report 1 Received 06/03/2021 Vendor Return Date 12/03/2021 Financial Stability Class Policy Contract 1 Received 06/03/2021 Wendor Return Date 12/03/2021 Financial Stability Class Participants Status Hit Workplan CoRPS Report ID Financial Stability Class Workplan CoRPS Report ID Financial Stability Class



Motor Vehicle Report (MVR)

PolicyCenter orders a Motor Vehicle Report (MVR) at the time of issuance for a new submission or a policy change when a driver is added.

Three different scenarios are possible regarding the return of the MVR:

- 1. MVR returns successfully, matching information entered on the submission. The policy is successfully bound.
- 2. MVR returns, but with validation messages requiring agent review and verification. The policy is not bound, allowing the Agent to make any adjustments and issue the policy.
- 3. MVR was not returned. Driver information needs reviewed for accuracy on the "Drivers" screen. The policy is not bound, allowing the Agent to make any adjustments and issue the policy.

Additional information on each scenario is provided below.

Scenario 1: MVR returns successfully, matching information entered on submission

Step 1	
Action	Screen
 When entering a new policy, on the "Quote" screen: Select the "Finalize Quote" button. If the returned MVR is clean or matches what was entered in PolicyCenter, the system assigns a Policy Number and issues the policy with the completed Payment information. The submission is bound, and no further action or steps are required. 	PolicyCenter" Desktop Account Policy Search Team Administration Testing Training Actions Image: Submission Quoted Image: Policy Center" Account: Quote Account: Quote Submission Quoted Image: Submission Number Policy Policy Period 12/03/2021 Divers Submission Number Policy Centract Policy Period 12/03/2021 06/03/2022 Taxes & Surcharges S41.3 Total Premium S623.80 Taxes & Surcharges S41.3 Total Premium S623.80 Policy Contract Policy Address CROWNE POINT, IN 46224-3592 Total Cost S657.93 Onvers County MARION Residual Market RM 15 Total Cost S657.93 Vehicles Residual Market RM 15 Edit Discounts/Surcharges Policy Level Discounts/Surcharges Policy Level Discounts/Surcharges No Discounts Applied Underwriting No Discounts Applied Vehicle Level Discounts/Surcharges No Discounts Applied Vehicle Level Discounts/Surcharges
Important Note: At any time, you may review the MVR by selecting "Underwriting" in the "Tools" section; go to the "Motor Vehicle Records" tab and select the "Reference Number" link.	

Auto Report Ordering (10 of 16)

Scenario 2: MVR returns, but with messages requiring Agent review and verification

Step 1

Action

In some cases, the "Validation Results" tab may display the message: "One or More MVRs needs to be verified. Please review all violation information on Accident/Violation screen."

You will need to review the "Accidents/Violations" screen to see what was returned on the MVR and then issue the policy to successfully complete the submission process:

• Select the "Clear" button.

Important Note: Selecting the "Clear" button on the "Validation Results" tab only removes the "Validation Results" tab. It does NOT fix the issue. The policy is not issued or bound at this point.

1	Des <u>k</u> top	▼ Account ▼ Policy	▼ Searc <u>h</u> ▼ <u>T</u> eam <u>A</u> dminist	ration Testing	: 🛛 👁 🖸
Actions		Submission (Binding)	Rersonal Auto Texas Effective: 04/10	8/2022 Account:	
Submission		Quote <back< td=""><td>Next > Edit Issue Policy Pr</td><td>int Quote</td><td></td></back<>	Next > Edit Issue Policy Pr	int Quote	
		Submission Number		Total Premium	\$1,980.57
Policy Contract	^	Policy Period	04/18/2022 - 10/18/2022	Fees	\$2.00
Policy Info		Primary Named Insured		Total Cost	\$1,982.57
Drivers		Policy Address	CODDELL TV 75010 2759		
Accidents/Violatio	ons	County	DALLAS		
Vehicles		Underwriting Company	Colonial County Mutual Insurance Com	10301	
Licago Pared Incu	12000	Residual Market	DM 81	party	
osage-based insu	rance	Residuer market	10102		
Coverages		Summary Fees			
Lienholder/Additi	onal Int	Applied Discounts	/Surcharges		
Underwriting		Applied Discourtes	ourenarges		
Quote		Policy Level Discounts/Surch	arges		
Payment		Description \$			
	*	1 Advance Quete Discourt			
Validation Results					
Clear					
Warnings:					
\rm One or More MVR	ts needs to be ve	rified. Please review all violation i	information on Accident/Violation screen		

Screen

Step 2

Action				Screen		
On the "Quote" screen:			1			
	<u>0</u>	Des <u>k</u> top 🔻	Account V Policy	▼ Searc <u>h</u> ▼ <u>T</u> eam <u>A</u> dmi	inistration Testing	: 🖉 🞯 😡
 Select the "Accidents/Violations" link. 	Actions	₽	Submission (Binding)	Personal Auto Texas Effective:	04/18/2022 Account	
	Submission Binding		Quote Reack	Next > Edit Issue Policy	Print Quote	
			Submission Number		Total Premium	\$1,980.57
	Policy Contract	^	Policy Period	04/18/2022 - 10/18/2022	Fees	\$2.00
	Policy Info		Primary Named Insured		Total Cost	\$1,982.57
	Drivers		Policy Address	COPPELL TX 75010-3758		
	Accidents/Violations		County	DALLAS		
	O Vehicles		Underwriting Company	Colonial County Mutual Insurance	Company	
	Usage-Based Insuranc	æ	Residual Market	RM 81		
	Coverages		Summary Fees			
	Lienholder/Additional	Interest		10		
	Underwriting		Applied Discounts	/Surcharges		
	Ouote		Policy Level Discounts/Surch	harges		
	- Contraction of the Contraction		Description ≑			
	Payment		Advance Quote Discount			
	Tools	^	Home and Car Discount			
	Notes		Papeness Policy Discounc			
			Vehicle Level Discounts/Sur	charges		
	 Available Coverages 		Description	2018 AUDI Q5 2.0T QU		

Auto Report Ordering (11 of 16)

Scenario 2, continued

Step 3

Action

Review information for each driver on the "Accidents/Violations" screen, to discern if anything may impact the premium. For example, did the client not report a violation, which returned in the MVR? Such discrepancies may impact the premium quoted by the system.

The "Source" field indicates where the information was obtained:

- Agent
- ALH
- MVR

ALH and MVR-obtained information cannot be removed. Agent-entered information not returned by the MVR <u>can</u> be removed, if not valid, and the Report Date differs from the Agent-entered Accident or Violation. This may be important as reported information impacts the premium.

Important Note: To remove an agententered line, select the "Edit" button, then select the checkbox to the left of the line and select the "Remove" button. 11 Desktop | • Account | • Policy | • Search | • Team Administration | • Testing | • : 📝 🙆 Go to (Alt+/) 🕒 Submission (Binding) 🚓 Personal Auto Texas Effective: 04/18/2022 Actions Accidents/Violations <Back Next> Edit [ssue Policy] O A see
 Date of Birth
 Gender
 Marital Status
 Relationship to Insured
 Driver Type
 Driver
 Female Single Primary Named Insured Driver Female Single Primary Named Insured Driver Accidents/Violations (III -🛛 # 🖨 Туре Description Code Occurrence Date

Override

Source 3 Accident Damage to Property Over Threshold 002 03/16/2019 ALH 4 Violation Following too Closely 022 06/01/2019 No MVR 139 11/09/2014 5 Violation Seat Belt Violation Agent Coverages Start Charge Date Accident 04/18/2022 Type Damage to Property Over Threshold Expiration Date 02/16/2023 Description Code 002 03/16/2019 Occurrence Date Conviction Date 03/16/2019 Chargeable Date ALH Source

Chargeal

Reason Not Chargeable

Screen



Auto Report Ordering (12 of 16)

Scenario 2, continued

Step 4

Action	Screen
After validating all the information is correct, you may continue quoting and issuing the policy.	Des <u>k</u> top ▼ Account ▼ <u>Policy</u> ▼ Searc <u>h</u> ▼ Ieam Administration ▼ Testing ▼
The system will re-rate the submission with two possible results:	Your Submission (#has been bound. Billing Account Number: • View your submission (#) • View your policy (#)
 If the premium is the same as previously quoted, the submission will bind (as shown here). 	G ot ot the submission manager for this acci Documents Submit an application for a different accou
 If the premium increases or is ineligible based on returned information, PolicyCenter stops the bind process and displays a new Validation message. To proceed binding the submission, you must select the "Issue Policy" button a second time. 	

Auto Report Ordering (13 of 16)



Scenario 3: MVR not returned. Driver info needs reviewed & updated, if necessary

Step 1

Action

In some cases, the "Validation Results" tab may display one or more validation messages stating the MVR(s) on the policy could not be found or need(s) to be reviewed and/or verified.

• Select the "Clear" button.

Important Note: Selecting the "Clear" button on the "Validation Results" tab only removes the "Validation Results" tab. It does NOT fix the issue. The policy is not issued or bound at this point.

	Des <u>k</u> top	Account Policy	▼ Searc <u>h</u> ▼ <u>T</u> eam <u>A</u> dmin	istration 💌 Testing 🖛	: 🛛 👁 🛛
ctions	₽	Submission (Binding)	nersonal Auto Texas Effective: 04	4/18/2022 Account:	
ubmission	î.	Quote <back< td=""><td>Next > Edit Issue Policy</td><td>Print Quote</td><td></td></back<>	Next > Edit Issue Policy	Print Quote	
		Submission Number		Total Premium	\$1,980.57
Policy Contract	^	Policy Period	04/18/2022 - 10/18/2022	Fees	\$2.00
Policy Info		Primary Named Insured		Total Cost	\$1,982.57
Drivers		Policy Address	COPPELL, TX 75019-3758	1	
Accidents/Violatio	ons	County	DALLAS		
Vehicles		: Underwriting Company	Colonial County Mutual Insurance C	ompany	
Usage-Based Insu	rance	Residual Market	RM 81		
Coverages		Cummany Foot			
Lienholder/Additi	onal Int	Summary rees			
Underwriting		Applied Discounts/	/Surcharges		
		Policy Level Discounts/Surcha	arges		
Quote		Description ≑			
Payment		Advance Quete Discount			
ratioation Results					
Clear					
Warnings:					

Saraan

Step 2

Action

On the "Quote" screen:

- Select the "Edit" button to edit the submission.
- Select the "OK" button on the confirmation pop-up window.
- Select the "Underwriting" link.



Auto Report Ordering (14 of 16)



Scenario 3, continued

Step 3

Action	Screen
On the "Underwriting" screen: Select the "Motor Vehicle Records" tab. 	Desktop Account Policy Search Team Administration Testing : Co Actions ::
Step 4	
Action	Screen

The "Status" displays as "No Hit," indicating the MVR could not be found.

You will need to verify the driver information is correct on the "Drivers" screen. In most cases, the driver's license number was entered incorrectly.

• Select the "Drivers" link.



Auto Report Ordering (15 of 16)

Scenario 3, continued

Step 5

Action	Screen
Review the "Drivers" screen to ensure the driver's license number is correct.	Desktop Account Policy Search Team Administration Testing Testing
If it is <u>incorrect</u> , make the correction and issue policy.	Submission Driver's <back< th=""> Next> Quote Withdraw Submission Pending Driver Details Policy Contract. Add Remove Policy Info Driver Details</back<>
If the Driver information is <u>correct</u> , has customer recently married or moved? A new address or name change for the client could be why the MVR could not be found.	Drivers Accidents/Molations Vehicles Vehicles Person Prefix Inst Name
You can manually reorder the MVR using different policy information.	Lenindude/publichait interex Middle Name License State * Texas Underwriting Last Name * License State * Texas Quote Suffix <none> License Status Active Pryment Driver Type * Driver Discounts Principal Driver * O'yes No Associate Yes No</none>
reordering the MVR.	Notes Date of Birth * Image: Constraint of C
 Select the "Underwriting" link. 	Workplan Gender Financial Responsibility Financial Responsibility Financial Responsibility Financial Responsibility

Step 6 Action Screen On the "Underwriting" screen: <u>0</u> Desktop | • Account | • Policy | • Search | • Ieam Administration | • Testing | • : 📝 🚳 😡 🗈 🛃 Submission (Pending) 🦛 Personal Auto Texas Effective: 04/18/2022 Account: Select the checkbox to the left of the Underwriting Sack Quote Withdraw Submission "Name" field. Submission Pending UW Issues Prior Policies Prior Losses Credit Bureau Report Motor Vehicle Records Select the "Re-Order Motor Vehicle" Re-Order Motor Vehicle Records Records" button. Drivers Name 🗘 Date of Birth 🗘 License State 🗘 Report Ordering Status 🗘 Vendor 💠 Status 🗘 Date Ordered 🌩 Accidents/Violations Texas Received LXN No Hit 04/18/2022 Vehicles Type 💠 Violation/Suspension Date 🌩 Conviction/Reinstatement Date 💠 Description 💠 Points 🜩 Accident/Violation No data to display Coverages Lienholder/Additional Interest

Auto Report Ordering (16 of 16)

Scenario 3, continued

top 7

Step 7		
Action	Screen	
 The "<i>Re-Order Motor Vehicle Records</i>" screen shows data for the driver selected. You can update information on this screen. For example, it might be necessary to use a different last name if the member has recently been married. Update the appropriate information. Select the "OK" button. 	Desktop Account Pending Pending Policy Contract Policy Info Drivers Accidents/Violations Vehicles Usage-Based Insurance Coverages Lienholder/Additional Interest SN	
Step 8		
Action	Screen	
Once the MVR report is successfully ordered, the "Status" changes from "No- Hit" to either "Clean" or "Adverse", depending on what returned on the report. You may quote and issue the submission.	Image: Status Image: Status<	
hour period. For additional attempts, you need to wait until the next day to try again.	Accidents/Violations Name © Date of Birth © License State © Report Ordering Status © Vendor © Status © Date Ordered © Vehicles Vehicles Texas Received UXN Clean 04/18/2022 Vehicles Type © Violation/Suspension Date © Conviction/Reinstatement Date © Description © Points © Accident/Violation	

Important Note: Relevant accident data (NOT violations) populates the "Accidents/Violations" screen. Review the screen to ensure a single accident is listed only once. An override process is available if the Agent disagrees with anything found on the report. Overrides require Underwriting review.

Type 💠 Violation/Suspension Date 🌣 Conviction/Reinstatement Date 🌩 Description 💠 Points 🌩 Accident/Violation No data to display

Return to Top

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⁽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.