

# Agent Center Administration Tips



## Administrator's Authority

You have the authority to add, update and remove users in your office. When you add users, you give them authority to the functions on Agent Center which are needed for their jobs.

**Administrators must have access to a function to grant access to that function for another user.** If the authority is changed for one administrator, it changes for all administrators and users in your agency.

It is recommended that your agency always have two administrators.

## Add Administrator

To request new/additional administrators:

1. The individual must have an active Agent Center User ID.
2. Contact the IT Service Desk - access can only be requested by current administrator, agency owner/principal, or your sales manager.
3. Provide the following information so the new administrator's identity can be verified:
  - First and Last name
  - Email address
  - Agency Number

## Manage Users

Agent Center Administration | User ID, Agency #

Nationwide® Manage Users

Agency: Agency Name (Number) [v] First Name: [ ] Last Name: [ ] User ID: [ ]

Include Archived Users: ☐

Clear Results Add User Search

The "Manage Users" tab automatically displays when accessing Agent Center Administration. Select "Search" to display a list of all your agency's users who have authority to sign into Agent Center.

By accepting a copy of these materials:

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## Manage Users (cont'd)

Agent Center Administration | User ID, Agency # Help Close

**Nationwide** Manage Users

Agency:  First Name:  Last Name:  User ID:

Include Archived Users ☐

Previous 1 ... 7 **8** 9 ... 155 Next

First Name	MI	Last Name	User ID	Agency Number	Email	Phone	Actions
Producer		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX	XXX-XXX-XXXX	<a href="#">Multiple Agency Admin</a>
Producer-2		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-3		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-4		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-5		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-6		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX	XXX-XXX-XXXX	
Producer-7		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-8		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		<a href="#">Single Agency Admin</a>
Producer-9		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-10		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-11		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		

"Admin" displays as a designation for you and other agency administrators. You cannot edit producers who have admin rights.

As an administrator, you will maintain this list and the information available. The list is sortable by first or last name, User ID, or Agency Number.

- "First Name/MI/Last Name" displays existing users in alphabetical order based on last name.
- "User ID" displays the assigned Agent Center User ID.
- "Agency Number" displays the agent number the user is associated with.
- "Email" displays the email address associated with the user in the system.
- "Phone" displays the phone number associated with the user in the system.
- "Actions"

**Access** – Select the lock icon from the "Actions" column. Review the user's access as needed to assist them with any concerns they may have regarding access to the Agent Center. You can assist them with Identity Authentication activity, Password Reset activity, and Login Failure history.

**Edit** – Select the pencil icon (edit icon) from the actions column and make changes to the user's information as necessary. After updating the data, select the 'Submit' button. A name change for a Transition agency user may require additional fields to be completed before final submission. A confirmation message displays on the screen indicating the ID was successfully updated and the user information displays.

**Copy** – Select the page icon to copy all the data for a user so it may be duplicated in order to create a new user with the same settings.

**Delete** – Select the trash can icon from the Actions column. A message or modal displays to advise of any additional information needed to complete the user deletion process. If you select 'Delete' or 'Submit' the process continues and a successful deletion message displays on the screen. The delete function removes this user from your list and prevents them from having authority on the Agent Center.

## Add User

## Step 1

## Action

On the “Manage Users” page, select the “Add User” button to open a blank “Add User” template.

## Screen

Agent Center Administration | User ID: Agency #

Nationwide Manage Users

Agency: Agency Name (Number) First Name: Producer Last Name: Name User ID: XXXXX

Include Archived Users ☐

Clear Fields Add User Search

First Name	MI	Last Name	User ID	Agency Number	Email	Phone	Actions
Producer		Name	XXXXX	XXXXX	XXXXX@XXXXX.XXX	XXX-XXX-XXXX	Single Agency Admin

## Step 2

## Action

Complete the basic information and Producer settings sections:

- **Associate Agency** - if you, as the administrator:
  - Have access to one agency code, the new user will automatically have the same main agency assigned.
  - Have access to more than one agency, a list of your agency access appears.
    - Select the User's main agency.
    - Check the boxes for all agencies the user needs to access.
- **Producer Information** - Provide complete information. The user's phone number is helpful to the Service Desk staff as they provide customer service to your agency. You must provide the email address for each new user. They will receive their User Account ID and a one-time password directly from the company to this address.
- **User Settings** - From the list that displays:
  1. Producers will have access to links and information within Agent Center based on your agency's contract. Additional items such as reports, and download config are available only to admins.
  2. Use the checkboxes below the “Agent Update States” field to select additional states for agent updates (notifications through Agent Center). The agency resident state is the default.
  3. After you complete the fields, select “Submit” and the system automatically assigns a new User ID.

A confirmation message displays on the screen indicating the ID was successfully added and the user information displays. A confirmation email is sent to the administrator adding the user outlining the basic information. A password will be assigned, and an email message sent to the producer which includes their one-time password.

## Screen

Add User

Attention Exclusive Transition Agents: When adding new users, NIWE ID's are no longer required and users should be setup with your new independent Channel agency number.

Agencies

Search

Associate	Agency Number	Agency Name	Main Agency?
<input type="checkbox"/>	XXXXX	Agency Name	<input checked="" type="radio"/>

\*First Name: Middle Name: \*Last Name:

\*User ID: generated \*Email:

Phone: (000) 000-0000

**User Settings**

Agent Center now automatically customizes homepage options based on licensing contracts and agency user roles.  
NOTE: The following switches in dark text will continue to control viewability for staff in the agency.

Agency Production Reports ☐ Yes ☒ No

Awards & Recognition ☐ Yes ☒ No

Billing Notices ☒ Yes ☐ No

Brokerage General Agency - Policy System ☒ Yes ☐ No

CUFarm Profit Share ☐ Yes ☒ No

Claims Notices ☒ Yes ☐ No

Commission Statements - Historical ☐ Yes ☒ No

Compensation Statements - 2019 Forward ☐ Yes ☒ No

eLibrary ☒ Yes ☐ No

Inquiry ☒ Yes ☐ No

PL Service Metrics ☐ Yes ☒ No

PL Variable Compensation ☐ Yes ☒ No

Reference Connect ☒ Yes ☐ No

**\*Agent Update States: 2**

<input type="checkbox"/> Alabama	<input type="checkbox"/> Alaska	<input type="checkbox"/> Arizona
<input type="checkbox"/> Arkansas	<input type="checkbox"/> California	<input type="checkbox"/> Colorado
<input type="checkbox"/> Connecticut	<input type="checkbox"/> Delaware	<input type="checkbox"/> District of Columbia
<input type="checkbox"/> Florida	<input type="checkbox"/> Georgia	<input type="checkbox"/> Hawaii
<input type="checkbox"/> Idaho	<input type="checkbox"/> Illinois	<input type="checkbox"/> Indiana
<input type="checkbox"/> Iowa	<input type="checkbox"/> Kansas	<input type="checkbox"/> Kentucky
<input type="checkbox"/> Louisiana	<input type="checkbox"/> Maine	<input type="checkbox"/> Maryland
<input type="checkbox"/> Massachusetts	<input type="checkbox"/> Michigan	<input type="checkbox"/> Minnesota
<input type="checkbox"/> Mississippi	<input type="checkbox"/> Missouri	<input type="checkbox"/> Montana
<input type="checkbox"/> Nebraska	<input type="checkbox"/> Nevada	<input type="checkbox"/> New Hampshire
<input type="checkbox"/> New Jersey	<input type="checkbox"/> New Mexico	<input type="checkbox"/> New York
<input type="checkbox"/> North Carolina	<input type="checkbox"/> North Dakota	<input checked="" type="checkbox"/> Ohio
<input type="checkbox"/> Oklahoma	<input type="checkbox"/> Oregon	<input type="checkbox"/> Pennsylvania
<input type="checkbox"/> Rhode Island	<input type="checkbox"/> South Carolina	<input type="checkbox"/> South Dakota
<input type="checkbox"/> Tennessee	<input type="checkbox"/> Texas	<input type="checkbox"/> Utah
<input type="checkbox"/> Vermont	<input type="checkbox"/> Virginia	<input type="checkbox"/> Washington
<input type="checkbox"/> West Virginia	<input type="checkbox"/> Wisconsin	<input type="checkbox"/> Wyoming

Cancel Submit 3

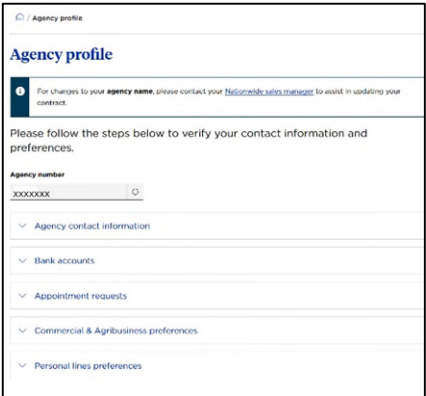
**Note:** The User ID is not active until the password email has been received.

## Agency Profile Updates

### What's changed?

- AMS download & registration is still accessible from the “Agency” tab of the mega menu, but it is no longer available from Agency profile
- Two pages are being retired since that functionality was added within Agency Profile:
  - Licensing maintenance
  - Producer audit from Agent Center administration

## Agency profile – All Functions

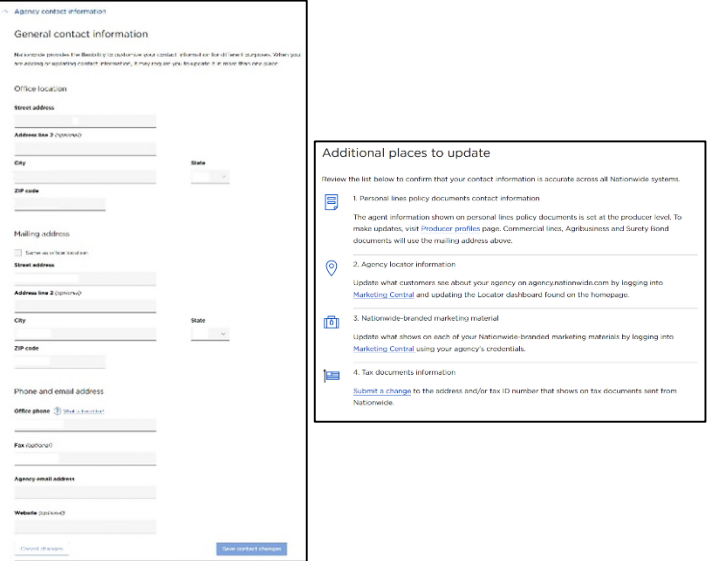
Action	Screen
<p>Available for all agency staff under the “Agency” tab, “Agency profile” section. This feature provides the ability to request updates to agency and producer information.</p> <p>Use the links on the page to complete forms which are electronically submitted through DocuSign to Licensing staff for processing.</p>	

### The following licensing maintenance forms/features are available:

- Update agency bank account information - premium sweep (Compensation bank accounts should be updated directly in SAP Sales Cloud)
- Add non-resident states, company appointments, or product lines to existing agencies/producers
- Cancellation requests for producers, states, or company appointments/product lines
- Producer name, email, or home address changes
- Adding a new producer to an existing agency (administrator must forward form link to the new producer to complete and submit).

Complete the form and sign electronically. Prompts and instructions are provided within each form. Once you select the “Finish” button, the form will route appropriately.

## Agency profile – Agency contact information

Action	Screen
<p>“Agency contact information” - request updates to agency and producer information:</p> <ul style="list-style-type: none"> <li>Office location address</li> <li>Mailing address</li> <li>Phone and email address</li> <li>Office phone</li> <li>Fax (optional)</li> <li>Agency email address</li> <li>Website (optional)</li> </ul> <p>“Additional places to update”</p> <p>This section provides other places where the agency contact information may need to be updated. Review and update as needed.</p>	

## Agency profile – Bank accounts

Action	Screen
<p>Update bank accounts for:</p> <ul style="list-style-type: none"> <li>Agency Sweep</li> <li>Commissions – link to SAP Commissions system</li> </ul>	<p>^ Bank accounts</p> <p>Agency sweep payment bank account</p> <p><a href="#">Submit request</a> to update the bank account used for agency sweep payments.</p> <p>Commissions &amp; bonuses bank account</p> <p>The bank account used for commissions and bonus payments can be updated in the <a href="#">SAP Commissions system</a>. Once in SAP, click the waffle in the upper right corner, choose <i>Workflow</i>, click the plus sign in the upper right and then click <i>Manage Payment Preferences</i>.</p>

## Agency profile – Appointment requests

Action	Screen
<p>Producer updates:</p> <ul style="list-style-type: none"> <li>Add a new producer</li> <li>Appointment requests</li> </ul> <p>Edit:</p> <ul style="list-style-type: none"> <li>Name</li> <li>Home address</li> <li>Telephone</li> <li>Email</li> </ul>	<p>^ Appointment requests</p> <p><a href="#">Submit a request</a> to add a <b>new producer</b> to an existing agency number.</p> <p>To add <b>additional appointment states to an agency</b>:</p> <ul style="list-style-type: none"> <li><b>Personal lines:</b> Please use the Add non-resident states form.</li> <li><b>Commercial and farm:</b> Additional non-resident appointments will typically be created automatically during the CL and Farm quoting process. The producer will be notified to contact the Technology Service Desk if the appointment can't be done automatically.</li> </ul> <p>Additional options for adding, <b>removing and changing producers</b> are available on the <a href="#">Producer profiles</a> page.</p>

## Agency profile – Commercial & Agribusiness preferences

Action	Screen
<p>Commercial &amp; agribusiness preferences on:</p> <ul style="list-style-type: none"> <li>Email for policy notifications</li> <li>Informational &amp; actionable email notifications</li> <li>Refund check preference</li> </ul>	<p>^ Commercial &amp; Agribusiness preferences</p> <p>Email notifications</p> <p>Commercial policy notifications will be sent to the email address provided unless No is selected. All notifications are also available on Agent Center's home page.</p> <p>Receive informational emails ?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Receive actionable emails ?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Email address for commercial policy notifications (optional)</p> <p>Refund check preference</p> <p>Refund checks can be sent to your agency or directly to the insured.</p> <p>Send refund check to:</p> <p><input type="radio"/> Agency <input type="radio"/> Insured</p> <p><a href="#">Cancel changes</a> <a href="#">Save preferences</a></p>

## Agency profile – Personal lines preferences

Action	Screen
<p>Personal lines preferences on:</p> <ul style="list-style-type: none"> <li>Email notifications</li> <li>Service Alliance 360</li> <li>Nationwide-branded marketing materials</li> <li>Tax document information</li> </ul>	<p>^ Personal lines preferences</p> <p>Email notifications</p> <p>A <b>producer</b> may set email notifications for their own policies in <a href="#">PolicyCenter</a> by clicking the gear in the top right and then clicking <i>Preferences</i> in the dropdown.</p> <p>An <b>agency administrator</b> can set email notifications, if desired. This will override individual producer preferences. In the <a href="#">PolicyCenter Administration</a> dropdown, search for a user and click the <i>Email Addresses</i> tab. Follow the screen prompts to set notification preferences at the producer or agency level.</p> <p>Service Alliance 360 preferences</p> <p>Select your preferences for how the Nationwide Service Center handles cancellation and other preferences on the <a href="#">SA360 Preferences</a> page.</p>