

PolicyCenter

Description:

This job aid reviews how to add, replace, or remove a vehicle to an existing Auto policy.

If adding, replacing, or removing a vehicle to a PowerSports policy, see one of the following job aids:

- o "Add, Replace, or Remove a Vehicle to an Existing PowerSports Motorcycle/Off-Road Vehicle Policy"
- o "Add, Replace, or Remove a Vehicle to an Existing PowerSports Pleasure Boatowners Policy"
- o "Add, Replace, or Remove a Vehicle to an Existing PowerSports Recreational Vehicle Policy"

Click each link below to jump to the relevant process steps:

- o Add a Vehicle
- o Replace a Vehicle
- o Remove a Vehicle

Add a Vehicle

| Step 1 | | |
|---|--|--|
| Action | Screen | |
| Open an existing Auto policy: | PolicyCenter* Desktop Account Policy Search Indiana John Salt Account: 6267745983 Policy: 9113K 500388 In Force (Expiration: | |
| • Click the Actions button. | Policy Info Policy Info Policy Info | |
| Select "Change Policy" from the drop-down menu. | ● Invers | |
| • | ◆ Coverages New Policy Transaction bornal Auto Period • Lienholder/Addisonal Change Policy - Froducer Code Update Cange Policy - Producer Cange Policy - Producer Code Update Cange Policy | |

Action Screen On the Start Policy Change screen, the Effective Date field defaults to the current date: • Enter the appropriate information in the Effective Date field. • Click the Next > button.

By accepting a copy of these materials:

⁽i) 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.



Job Aid Process (Add a Vehicle Cont.):

Step 3

| Screen |
|---|
| FolicyCenter® Desktop ▼ Account ▼ Policy ▼ Search ▼ Team Administration ▼ Testing ▼ Training ▼ |
| Actions Policy Change (Pending) - Personal Auto Indiana Effective: 10/30/2021 Primary: John Salt Account: 6267745083 |
| Policy Change 589378 Policy Info Next Quote Withdraw Work Order View Bill Calculator |
| Pending Address has been validated. |
| Policy Contract Primary Named Insured Change To: Policy Details |
| Policy Info Name John Salt Term Type 6 months |
| Drivers Policy Address Change To: Number of Terms 3 |
| Accidents/Niolations 2379 FOUR SEASONS PARKWAY Effective Date 10/30/2021 |
| Vehicles County MARION Expiration Date 04/30/2022 |
| Usage-Based Insurance Business Type Transfer Rate State Indiana |
| Coverages Secondary Named Insured Discounts |
| Lienholder/Additional Interest Easy Pay Sign Up ★ Yes • |
| Underwriting Household Composition Property Product Homeowner |
| Policy Review Policy Invested In International Journal Policy Review Policy Invested In International Policy Paperless Paperles |
| Ouote under the |
| Nationwide Family of Financial Products Companies? |
| |

Step 4

Action Screen On the Vehicles screen: • Click the **Create Vehicle** button.

| Step 5 | |
|--|--|
| Action | Screen |
| In the Basic Vehicle Information section: | PolicyCenter* Desktop |
| • Enter the appropriate information into the VIN field. | Policy Change 589378 Pending Policy Change 589378 Vehicle S < 8ack Next > Quote Wethdraw Work Order View Bill Calculator Vehicle Details Policy Change 589378 Vehicle S < 8ack Next > Quote Wethdraw Work Order View Bill Calculator Policy Change 589378 Vehicle S < 8ack Next > Quote Wethdraw Work Order View Bill Calculator Policy Change 589378 Vehicle Details Policy Change 589378 Policy Change 589378 Vehicle Details Policy Change 589378 Vehicle Details Policy Change 589378 Vehicle Details |
| Press the Tab key to populate the remaining Basic Vehicle Information. | Vehicle # \$\circ\$ \ Vehicle # \$\circ\$ \ Vehicle # \$\circ\$ \ \ Website # \$\circ\$ \ Website # \$\circ\$ \ Website # \$\circ\$ \ Website # \$\circ\$ \ Website # \ \ Accidenta/Velations \ |
| Complete any related non-VIN-related: for example, customization and garaging address. | Leenholder/Additional Interest Underwinting Vehicle # 3 Location Name # 1: 2279 FOUR SEAS Proley Review VM 1985SBL1CREAM60 Vehicle Trong Model Year 2012 Form: Make # FORD Model # 557 |
| Note: Refer to the <i>Copy Vehicle-Level Coverages</i> job aid for details on how to copy coverages from an existing vehicle to the newly-added vehicle. | Tools |



Click the **Next** > button.



Job Aid Process (Add a Vehicle Cont.):

defaults and you can proceed to Step 7.

Step 6

Action Screen On the *Usage-Based Insurance* screen: PolicyCenter™ Desktop | ▼ Account | ▼ Policy | ▼ Search | ▼ Ieam Administration ▼ Testing | ▼ Training | ▼ Select "Vehicle Program" from the Usage-Based Insurance <Back Next> Quote Withdraw Su If you want to enroll any vehicles in SmartMiles, select the Vehicle Program as Pay Per Mile (SmartMiles Device). Policy Program drop-down list. Please select the SmartRide Mobile App Program if no vehicles are enrolled in SmartRide SmartRide Instant or SmartRide Connected Car. Policy Enrollment Details **Note:** You only need to do this step if Usage-Based Insurance has been previously declined on the policy. If UBI was previously selected for vehicles currently on the policy, Vehicle Program

Step 7 **Action** Screen F PolicyCenter™ Desktop | ▼ Account | ▼ Policy | ▼ Search | ▼ Ieam Administration ▼ Testing | ▼ Training | ▼ In the Vehicle Enrollment Details section: Policy Change (Pending) Personal Auto Indiana Effective: 10/30/2020 Primary: John Salt Account: 6267 Usage-Based Insurance (*Back Next > Quote Withdraw Submission Complete the required **Vehicle Program** field. The **Enrollment** Policy Enrollment Details Status field defaults to "Enrolled". ★ Vehicle Program ▼ Text Notification Policy Program Vehicle Enrollment Details Vehicle # ⊕ Vehicle Type ⊕ Model Year ⊕ Make ⊕ Model ⊕ VIN ⊕ Devi 1 Private Passenger 2011 HOND PILOTEX 5°NYY4H6588001764 Yes 2 Private Passenger 2008 FORD MUSTANG GT 12'HT82H485113456 Yes 3 Private Passenger 2012 FORD E-350 SUP 1F8SS3BLLCB20466 Yes Note: The Annual Mileage field is optional if you select **Discount** (SmartRide Device) but required for Pay Per Miles (SmartMiles). Quote and Issue the policy change.

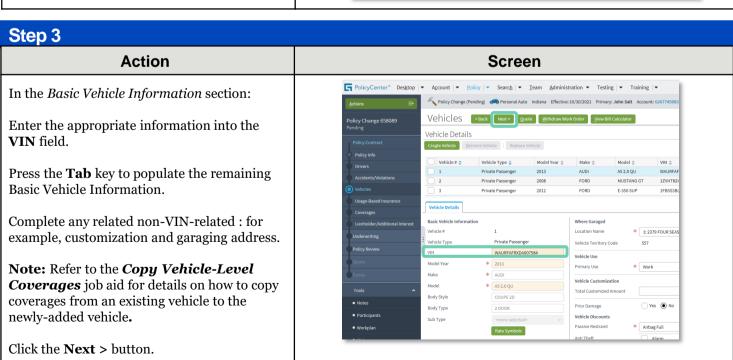




Replace a Vehicle

Step 1 Action Screen After locating the policy and initiating a policy FolicyCenter™ Desktop | ▼ Account | ▼ Policy | ▼ Search | ▼ Team Administration ▼ Testing | ▼ Training | ▼ change: Nolicy Change (Pending) Personal Auto Indiana Effective: 10/30/2021 Primary: John Salt Account: 6267 Vehicles < Back Next > Quote Withdraw Work Order View Bill Calculator Navigate to the Vehicles screen. Vehicle Details Create Vehicle Replace Vehicle Select the checkbox to the left of the Vehicle Type 💠 **Vehicle** # which needs to be replaced. Private Passenger MUSTANG GT 1ZVHT8 Click the **Replace Vehicle** button.

Step 2 Action Screen FolicyCenter Desktop Account Policy Search Ieam Administration Testing Training Trai If the vehicle being replaced was currently Policy Change (Pending) Personal Auto Indiana Effective: 10/30/2021 Primary: John Salt Account: 6267745 enrolled in the SmartMiles program, the Vehicles Seack Next Quote Withdraw Work Order View Bill Calculator system displays a message at the top of the Warnings on current page: Vehicles screen: ▲ The vehicle being replaced is currently participating in SmartRide/SmartMiles. Please instruct the member to install the existing device in the replacement vehicle to start the program over with the replaced vehicle. Vehicle Details "The vehicle being replaced is currently Create Vehicle Rem participating in SmartRide/SmartMiles. Please instruct the member to install the Private Passenger FORD MUSTANG GT 17VHT82 existing device in the replacement vehicle to Private Passenger 2012 FORD E-350 SUP 1FBSS3B start the program over with the replaced vehicle." Basic Vehicle Information Where Garaged * 1: 2379 FOUR SEAS





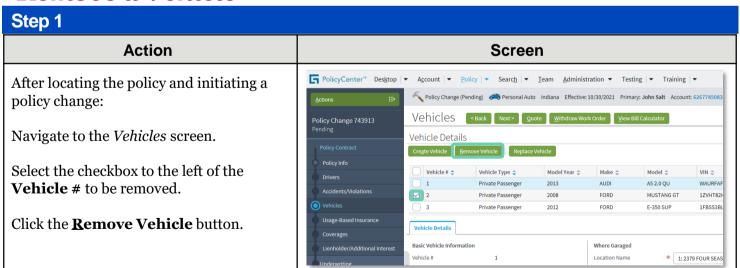


Job Aid Process (Replace a Vehicle Cont.):

Step 4 Action Screen On the *Usage-Based Insurance* screen: FolicyCenter™ Desktop ▼ Account ▼ Policy ▼ Search ▼ Team Administration ▼ Testing ▼ Training ▼ Select the desired enrollment status Policy Change (Pending) Personal Auto Indiana Effective: 10/30/2020 Primary: John Salt Account: 626774501 from the Enrollment Status drop-Usage-Based Insurance Sack Next> Quote Withdraw Submission down list in the Vehicle Enrollment To enroll in SmartRide, please select the SmartRide Mobile App Program if no vehicles are being enrolled in SmartMiles or are currently participating in a usage based insurance Details section if different from the Policy Enrollment Details replaced vehicle. * Vehicle Program ▼ Text Notification Vehicle Enrollment Details Complete the required fields. They Vehicle# \$\phi\$ Vehicle Type \$\phi\$ Model Year \$\phi\$ Make \$\phi\$ Model \$\phi\$ VIN \$\phi\$ Device Compatible 1 Private Passenger 2013 AUDI A5 2.0 QU WAURFAFXDA007584 Yes include: o Enrollment Status Private Passenger 2008 FORD MUSTANG GT 1ZVHT82H485113456 Yes E-350 SUP Private Passenger 2012 FORD 1FBSS3BL1CDB20466 Yes o Vehicle Program Device Compatible Instant Verified Discount No Quote and Issue the policy change. * Enrolled **Note:** Enrollment status automatically Annual Mileage populates based on the vehicle being Typical Annual Mileage replaced but may be changed according to

Remove a Vehicle

the wishes of the member.







Job Aid Process (Remove a Vehicle Cont.):

Step 2

Action Screen After removing the vehicle: PolicyCenter® Desktop | ▼ Account | ▼ Policy | ▼ Search | ▼ Ieam Administration ▼ Testing | ▼ Training | ▼ Policy Change (Pending) Personal Auto Indiana Effective: 10/30/2021 Primary: John Salt Account: 62677 Click the **Coverages** link to ensure the Vehicles Sack Next> Quote Withdraw Work Order View Bill Calculator Policy Change 743913 coverages have also been removed. Vehicle Details Create Vehicle Replace Vehicle 2013 ALIDI A5 2.0 OU WALIDE 3 Private Passenger 2012 FORD E-350 SUP 1FBSS3B Vehicle Details Basic Vehicle Information * 1: 2379 FOUR SEAS Vehicle Territory Code WAURFAFRXDA007584 Vehicle Use Model Year 2013 AUDI

Step 3 **Action** Screen On the Coverages screen: FolicyCenter™ Desktop | ▼ Account | ▼ Policy | ▼ Search | ▼ Team Administration ▼ Testing | ▼ Training | ▼ Policy Change (Pending) Personal Auto Indiana Effective: 10/30/2021 Primary: John Salt Account: 626774508 Review the coverages to confirm the Coverages < Back Next > Quote Withdraw Work Order View Bill Calculator vehicle has been removed. Coverages Rating Factors Transaction Effective Date Quote and Issue the policy change. Previous Policy Full New Full Term Premium Total Pro-Rated Cost Policy-level Coverages Features Roadside Assistance $\overline{\checkmark}$ Accident Forgiveness \checkmark $\overline{\checkmark}$ Vanishing Deductible Subtotal: Vehicle Level Coverages copycoverages 2013 AUDI A5 2.0 OU 2012 FORD E-350 SUP Comprehensive $\overline{\mathbf{V}}$ $\overline{\mathbf{Q}}$