

Agent of Record (AOR) via Agent Center



Description

This job aid reviews how to request an Agent of Record change and how to request service on a policy until the new agent of record is bound directly in Agent Center.

Select the link to advance to the desired topic:

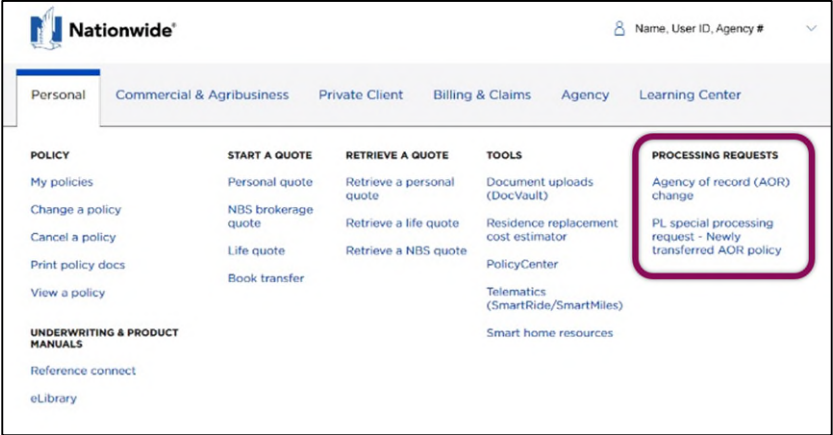
- [Agent of Record Change Request](#)
- [Newly Transferred Agent of Record Policy Service](#)

Agent of Record Change Request

Agents can now request an Agent of Record (AOR) change directly in Agent Center instead of emailing the Personal Lines Processing Center (PLPC) to request the change.

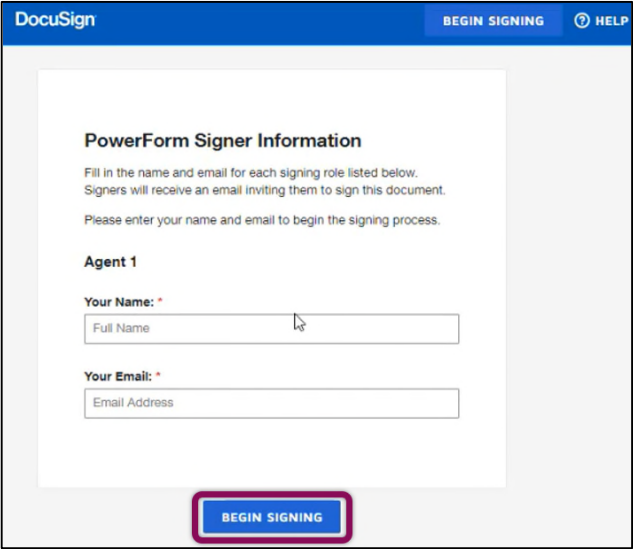
Important Note: Anyone can request an AOR. You do not have to be an agency admin to submit an AOR request.

Step 1


Action	Screen
On the “Personal Lines” tab, in the “Processing Requests” section of Agent Center, select “Agency of record (AOR) change”.	

Agent of Record Change Request, continued

Step 2

Action	Screen
You will be taken to DocuSign. Complete the required information on the screen and select the “Begin Signing” button.	 The screenshot shows the DocuSign 'PowerForm Signer Information' page. It includes instructions to fill in name and email for each signing role. Under 'Agent 1', there are input fields for 'Your Name' (with a placeholder 'Full Name') and 'Your Email' (with a placeholder 'Email Address'). A blue 'BEGIN SIGNING' button is highlighted with a red box at the bottom of the form.

Step 3

Action	Screen
<p>You are asked to read the “Electronic Record and Signature Disclosure”.</p> <ul style="list-style-type: none">• Read the disclosure and if you agree to the conditions, select the checkbox indicating, “I agree to use electronic records and signatures”.• Select “Continue”.	 The screenshot shows the DocuSign 'Please Review & Act on These Documents' page. It contains a disclosure about electronic records and signatures. A checkbox labeled 'I agree to use electronic records and signatures' is checked and highlighted with a red box. To the right, a yellow 'CONTINUE' button is also highlighted with a red box. Other buttons like 'FINISH LATER' and 'OTHER ACTIONS' are visible on the right side of the page.



Agent of Record Change Request, continued

Step 4

Action	Screen
<p>The “Agent of Record (AOR)” form displays. You must complete the required fields that are highlighted on the form.</p> <p>Important Note: To locate the Producer Code:</p> <ul style="list-style-type: none">• If you have admin rights, go to Agent Center and select <i>Agency > Agency Profile > Appointment Requests > Producer Profiles</i>.• If you do not have admin rights, go to PolicyCenter and select <i>Summary Screen > Producer of Record</i>. <p>Your individual Producer Code is the 3 digits to the right of the agency code (i.e. 12345-001).</p>	

Step 5

Action	Screen
<p>Once you complete the required information on the AOR form, select the “Finish” button.</p>	



Agent of Record Change Request, continued

Step 6

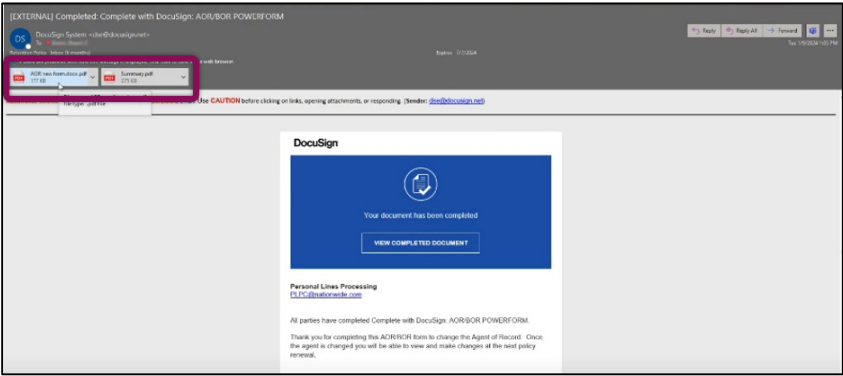
Action	Screen
To keep a copy for your records, select either the “Download” or “Print” button.	<div><div>Save a Copy of Your Document</div><div><div>↓</div><div>Your document has been signed</div><div>If you would like a copy for your records, select Download or Print and save.</div><div><div>DOWNLOAD</div><div>PRINT</div><div>CLOSE</div></div></div></div>

Step 7

Action	Screen
<p>When you select the “Download” button, the completed document displays for you to print and/or save.</p> <p>Select the “Close” button to finish.</p>	<div><div>Your document is now complete.</div><div><div>CLOSE</div><div>OTHER ACTIONS</div></div><div><div>Agent of Record (AOR)</div><div><div>Personal Lines AOR is used when the agent of record needs to be changed. The change is effective on the policies renewal date. If more than ten policies are needed, please reach out to your sales manager.</div><div>***Note: AOR FORM is retained in our office. By submitting this request it is confirmed the Acord 36 AOR form was signed by the named insured and is retained in our office.</div><div>For AOR please complete the following:</div><div><div>Main Agency Name:</div><div>(only needed when transferring to a different agent office/branch within the same agency)</div><div>New Agency Code: 12345</div><div>(5 digits, ex 98999)</div><div>Producer Name: John</div><div>(ex John Jones)</div><div>New Producer Code:</div><div>(8 digits, ex98999-002)</div><div>Named Insured: Jane</div></div><div>Only include policies within one household, a separate form is required for different customers.</div><div><div>Policy number 1: 9234</div><div>Policy number 2:</div><div>Policy number 3:</div><div>Policy number 4:</div><div>Policy number 5:</div><div>Policy number 6:</div><div>Policy number 7:</div><div>Policy number 8:</div><div>Policy number 9:</div><div>Policy number 10:</div></div><div><div>AOR new form.docx</div><div>1 of 1</div><div>CLOSE</div></div></div></div></div>

Agent of Record Change Request, continued

Step 8

Action	Screen
<p>You will receive a confirmation email with PDF documents of the submitted form and the summary.</p> <p>This is your record of the change. The PLPC will send an email when the request is complete.</p>	

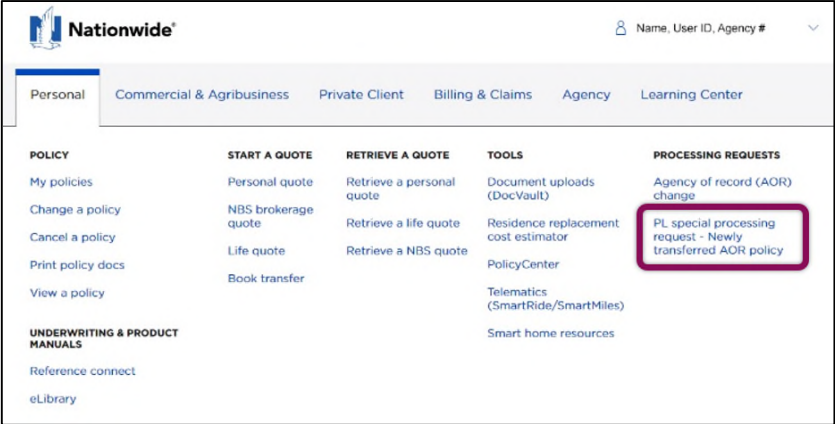
[Return to Top](#)



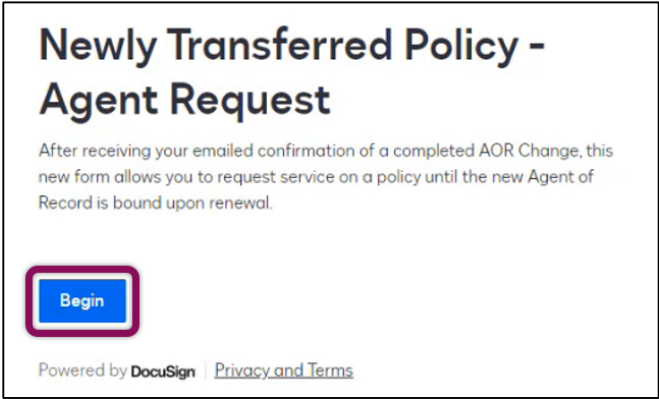
Newly Transferred Agent of Record Policy Service

You now have a special processing request form available to you for newly transferred agent of record policies. This allows you to request service on a policy until the new agent of record is bound. There is no need to call the Service Center. Simply follow the steps below to request service for your customer.

Step 1

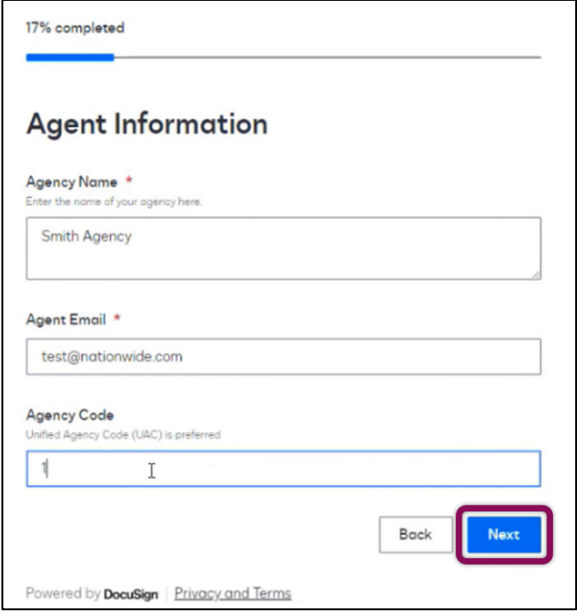
Action	Screen
On the “Personal Lines” tab, in the “Processing Requests” section of Agent Center, select “PL special processing request – Newly transferred AOR policy”.	

Step 2

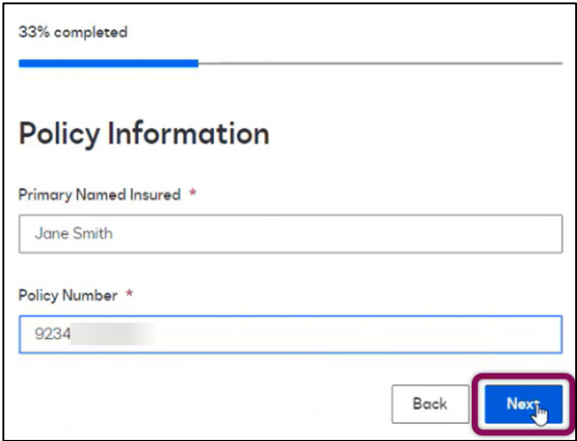
Action	Screen
<p>You will be taken to DocuSign.</p> <p>After you receive your email confirmation of a completed AOR change, you can request service on a policy until the new Agent of Record is bound upon renewal.</p> <p>Select the “Begin” button.</p>	

Newly Transferred Agent of Record Policy Service, continued

Step 3

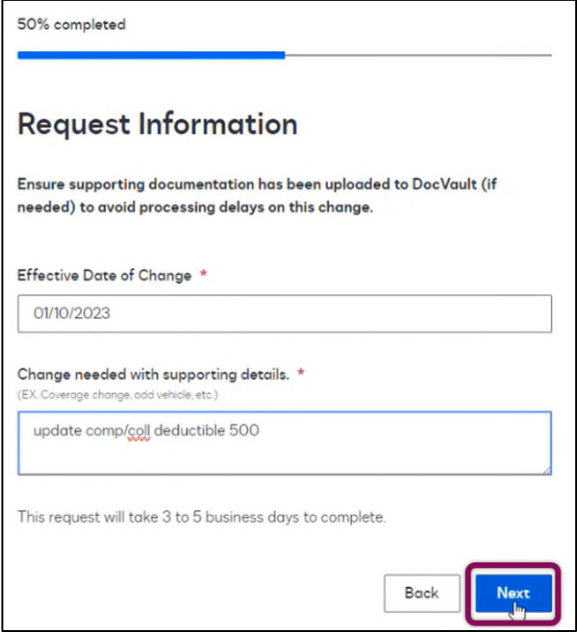
Action	Screen
<p>Complete the “Agent Information” screen. Fields with an * are required.</p> <p>Select the “Next” button</p>	

Step 4

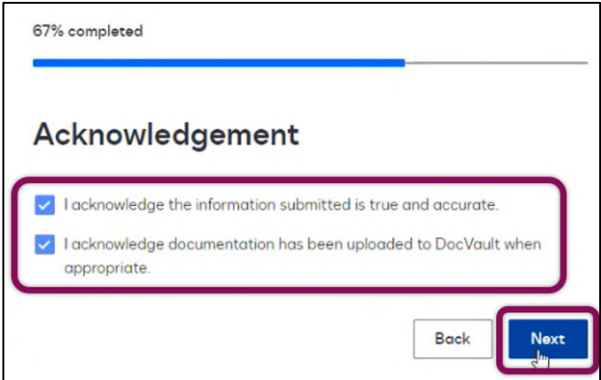
Action	Screen
<p>Complete the “Policy Information” screen. Fields with an * are required.</p> <p>Select the “Next” button.</p>	

Newly Transferred Agent of Record Policy Service, continued

Step 5

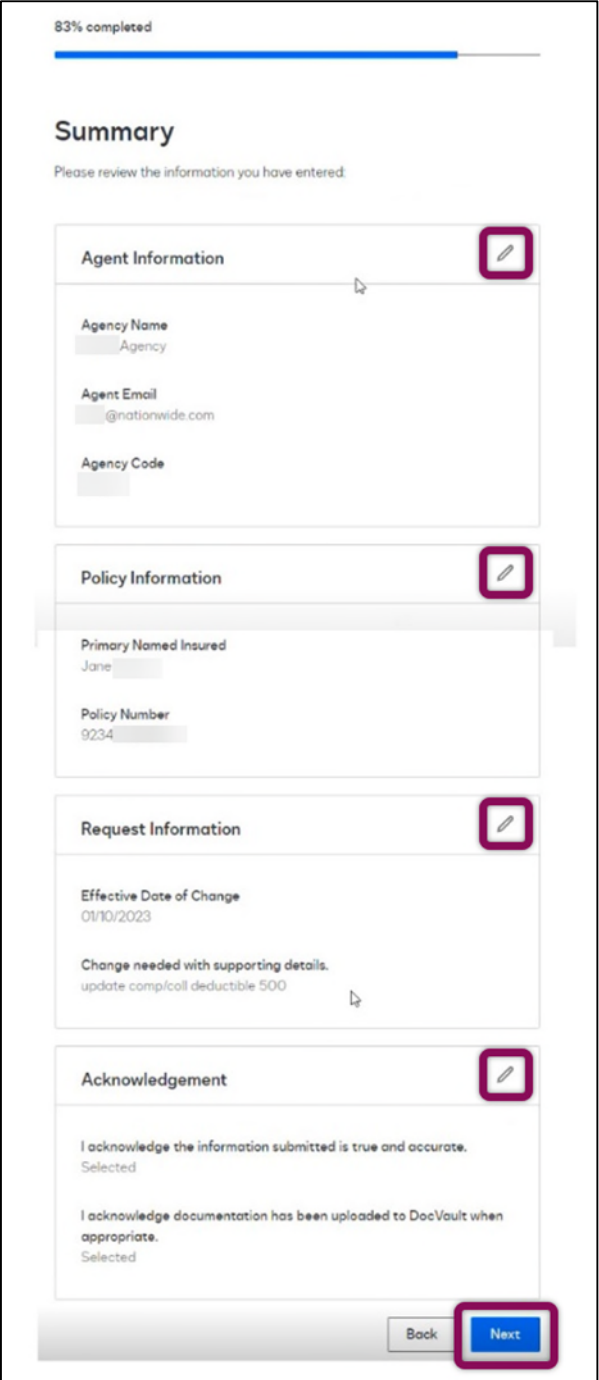
Action	Screen
<p>Complete the “Request Information” screen. Fields with an * are required. Make sure to use the correct policy number format.</p> <p>Select the “Next” button.</p>	

Step 6

Action	Screen
<p>You must select both statements on the “Acknowledgement” screen.</p> <p>Select the “Next” button.</p>	

Newly Transferred Agent of Record Policy Service, continued

Step 7

Action	Screen
<p>A "Summary" displays with the information you input for the policy change. If you need to edit any section of the form, select the edit icon by the appropriate section to make any changes.</p> <p>Once you have confirmed that everything is correct, select the "Next" button.</p>	



Newly Transferred Agent of Record Policy Service, continued

Step 8

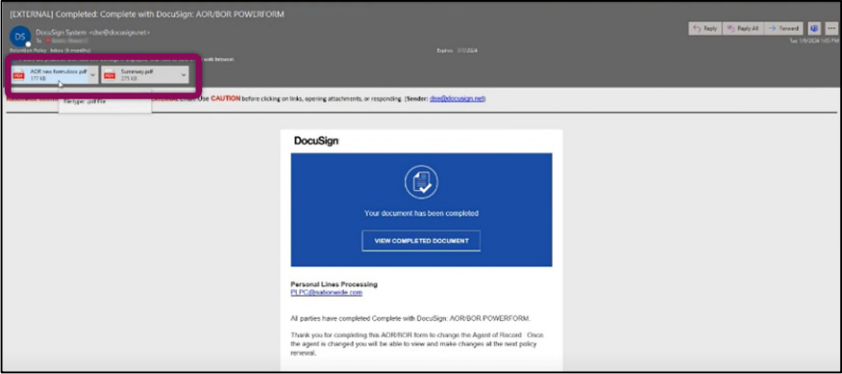
Action	Screen
<p>You are asked to read the “Electronic Record and Signature Disclosure”.</p> <ul style="list-style-type: none">• Read the disclosure and if you agree to the conditions, select the checkbox indicating, “I agree to use electronic records and signatures”.• Select “Continue”.	

Step 9

Action	Screen
<p>To complete the change, select the “Finish” button.</p> <p>Your request is sent to Personal Lines Processing.</p>	

Newly Transferred Agent of Record Policy Service, continued

Step 10

Action	Screen
<p>You will receive a confirmation email with PDF documents of the submitted form and the summary.</p> <p>This is your record of the change. The PLPC will send an email when the request is complete.</p>	

[Return to Top](#)

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.