

Change the Dwelling Location on A Tenant Policy

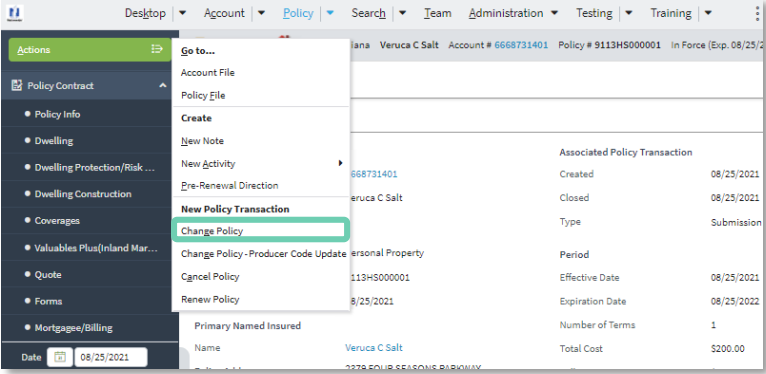
PolicyCenter



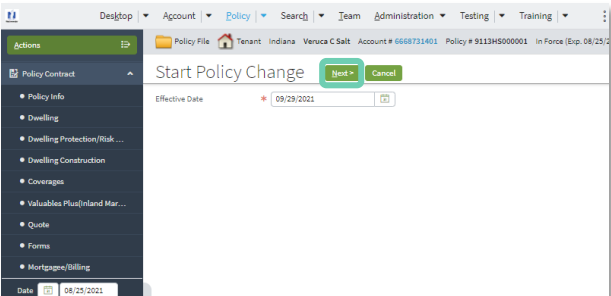
Description:

This job aid describes how to change the dwelling location on a tenant policy. The dwelling location name is the physical location of the property and typically the same as the policy address (mailing address) for the policy. In some instances, the location address and policy address may be different. One example is when the policy address is a post office box. If the location change is for an out-of-state address, you must create a new account, rewrite the policy, and cancel the existing policy.

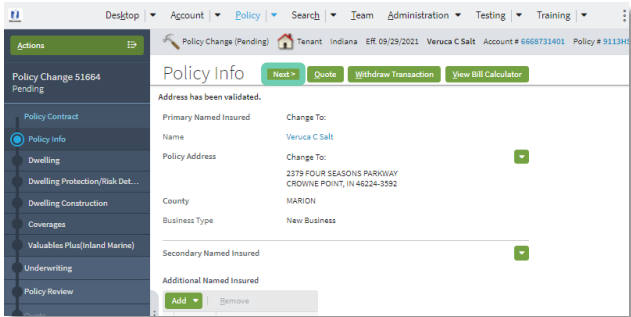
Step 1

Action	Screen
<p>On the <i>Summary</i> screen:</p> <ul style="list-style-type: none"> Click the Actions button. Select “Change Policy” from the drop-down menu. 	

Step 2

Action	Screen
<p>On the <i>Start Policy Change</i> screen:</p> <ul style="list-style-type: none"> Enter the Effective Date. The Effective Date defaults to today's date but may be changed. Click the Next button. 	

Step 3

Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> Click the Next > button. 	

Job Aid Process (Cont.) :

Step 4

Action

On the *Dwelling* screen:

- Click the down arrow to the right of the **Location Name** field.
- Select one of the following from the drop-down list:
 - “**New Address**” if you wish to enter a new location address.
 - “**Edit Current Address**” if you wish to modify the current address (such as correcting a street number or a misspelling).

Note: The steps are the same regardless of your selection in the drop-down list.

Screen

The screenshot shows the 'Dwelling' screen in the PolicyCenter application. The left sidebar contains a list of actions: Policy Change 51664 Pending, Policy Contract, Policy Info, Dwelling (selected), Dwelling Protection/Risk Det..., Dwelling Construction, Coverages, Valuables Plus(Inland Marine), Underwriting, and Policy Review. The main content area shows the 'Dwelling' details for a policy change. The 'Location Name' field is highlighted with a green box, and a dropdown menu is open showing 'New Address' and 'Edit Current Address' options. The 'Location Details' section includes fields for Occupancy (1), # Units in Building (4), Secondary (Yes/No), and Gated Community (Yes/No). The 'Geographic Data' section includes fields for County, Miles To Fire Station, Hydrant Within 1,000 Feet, Protection Class, Tax Code, Fire Code, and Fire Department.

Step 5

Action

On the *Location Information* screen:

- Enter the new location information into the required fields.
- Click the **OK** button.

Note: PolicyCenter may require you to confirm the policy address.

Screen

The screenshot shows the 'Location Information' screen in the PolicyCenter application. The left sidebar contains a list of actions: Policy Change 51664 Pending, Policy Contract, Policy Info, Dwelling (selected), Dwelling Protection/Risk Det..., Dwelling Construction, Coverages, Valuables Plus(Inland Marine), Underwriting, and Policy Review. The main content area shows the 'Location Information' details for a policy change. The 'Location Details' section includes fields for Address Line 1 (311 E 10TH ST), Address Line 2, City (INDIANAPOLIS), State (Indiana), ZIP Code (46224-3592), County (MARION), Territory (557), and Fire Code. The 'Geographic Data' section includes fields for Miles To Fire Station, Hydrant Within 1,000 Feet, Protection Class, Tax Code, Fire Code, and Fire Department.

Step 6

Action

On the *Dwelling* screen, the system updates the address in the **Location Name** field.

If other data is changed, those updates will be reflected in the **Geographic Data** section.

- Click the **Policy Review** link

Screen

The screenshot shows the 'Dwelling' screen in the PolicyCenter application. The left sidebar contains a list of actions: Policy Change 51664 Pending, Policy Contract, Policy Info, Dwelling (selected), Dwelling Protection/Risk Det..., Dwelling Construction, Coverages, Valuables Plus(Inland Marine), Underwriting, and Policy Review. The main content area shows the 'Dwelling' details for a policy change. The 'Location Name' field is highlighted with a green box, and a dropdown menu is open showing 'New Address' and 'Edit Current Address' options. The 'Location Details' section includes fields for Occupancy (1), # Units in Building (4), Secondary (Yes/No), and Gated Community (Yes/No). The 'Geographic Data' section includes fields for County, Miles To Fire Station, Hydrant Within 1,000 Feet, Protection Class, Tax Code, Fire Code, and Fire Department.

Job Aid Process (Cont.) :

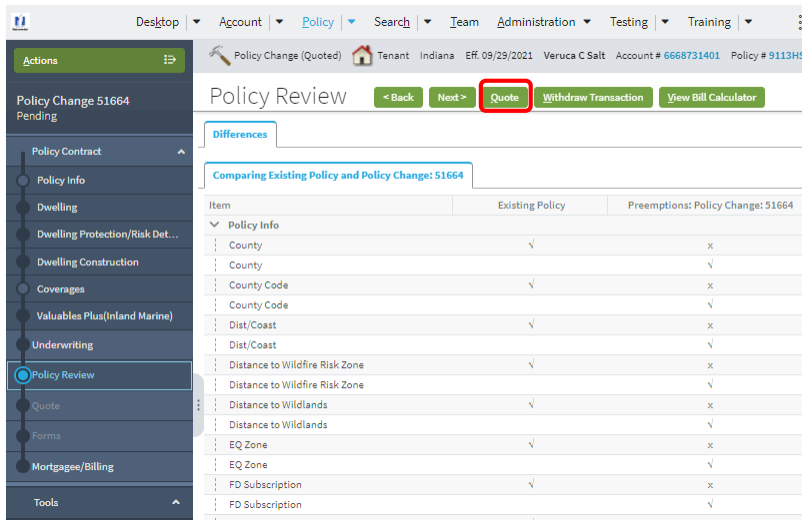
Step 7

Action

On the *Policy Review* screen:

- Click the **Quote** button.

Screen



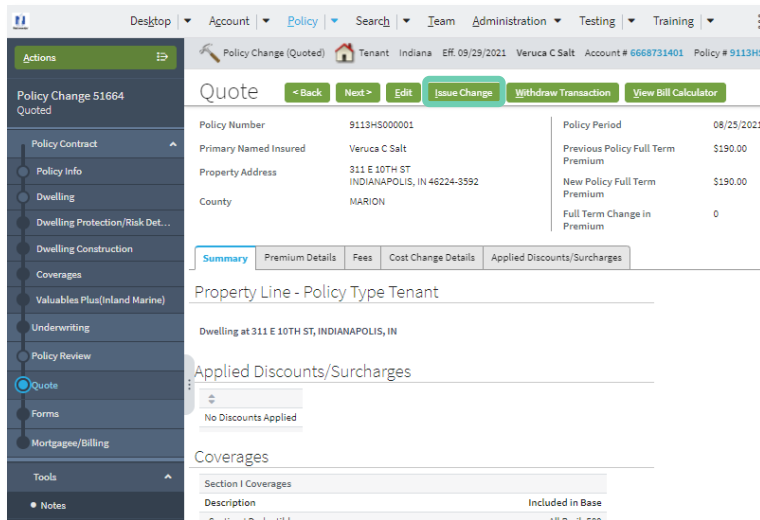
Step 8

Action

On the *Quote* screen:

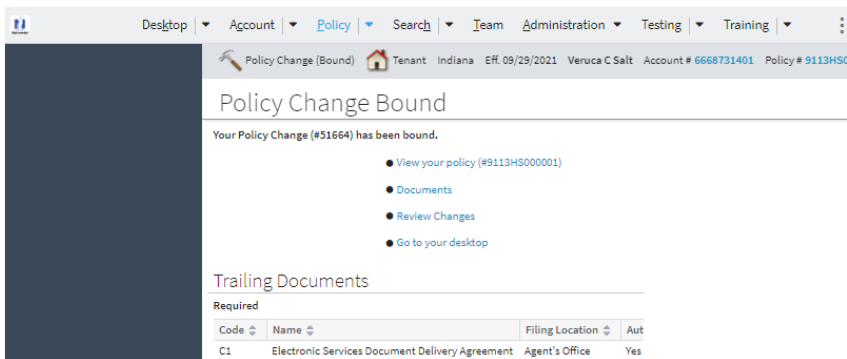
- Click the **Issue Change** button.
- Click the **OK** button on the pop-up confirmation window.

Screen



Job Aid Process (Cont.) :

Step 9

Action	Screen								
<p>The policy change has been bound. You can view the entire policy, review the changes to the policy, or return to your desktop from this screen.</p> <p>If any new trailing documents are generated because of the policy change, you must handle them per the current policy.</p>	 <p>The screenshot shows a web application interface for PolicyCenter. The top navigation bar includes links for Desktop, Account, Policy, Search, Team, Administration, Testing, and Training. The main content area is titled 'Policy Change Bound' and displays a confirmation message: 'Your Policy Change (#51664) has been bound.' Below this message are four links: 'View your policy (#9113HS000001)', 'Documents', 'Review Changes', and 'Go to your desktop'. At the bottom, there is a section titled 'Trailing Documents' with a table of required documents.</p> <table><thead><tr><th>Code</th><th>Name</th><th>Filing Location</th><th>Aut</th></tr></thead><tbody><tr><td>C1</td><td>Electronic Services Document Delivery Agreement</td><td>Agent's Office</td><td>Yes</td></tr></tbody></table>	Code	Name	Filing Location	Aut	C1	Electronic Services Document Delivery Agreement	Agent's Office	Yes
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