

Requesting Personal Lines Processing Changes

Job Aid



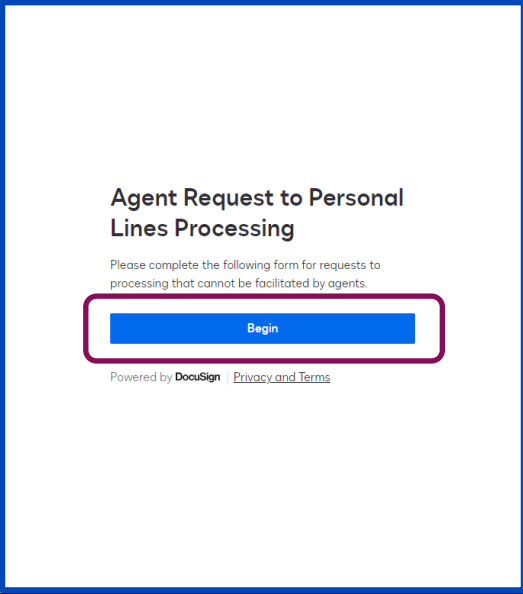
Description

The process to request a policy change that **cannot be performed by the Agent** is changing. Agents will no longer submit a processing request via email. Agents will use the *Agent Request to Personal Lines Processing* link located in Agent Center to complete a DocuSign form instead. Using this new process ensures all required information needed to process the change is received.

Please note: This change in process does not impact creating an Activity to Processing in PolicyCenter.

Agents may also use the link below to access the request form.

Agent Request to Personal Lines Processing

Step 1	
Action	Screen
Select the Begin button to get started.	

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Step 2

Action

Input the following:

- Your Agency Name, Your E-mail, and Your Agency Code

Select **Next**.

Screen

A screenshot of the 'Agent Information' form. The form has a title bar with a progress indicator. Below the title, there are three input fields: 'Agency Name' (with a red asterisk and a hint 'Enter the name of your agency here.'), 'Agent Email' (with a red asterisk), and 'Agency Code' (with a hint 'Unified Agency Code (UAC) is preferred'). The 'Next' button is highlighted in blue, and the 'Back' button is below it. At the bottom, it says 'Powered by DocuSign' and has links for 'Privacy and Terms'.

Step 3

Action

Input the following:

- Primary Named Insured's Name and Policy Number

Select the **Request Type** from the dropdown and select **Next**.

Screen

A screenshot of the 'Policy Information' form. The form has a title bar with a progress indicator. Below the title, there are three input fields: 'Primary Named Insured' (with a red asterisk), 'Policy Number' (with a red asterisk), and 'Request Type' (with a red asterisk and a hint 'Please select from the following options.'). The 'Request Type' field is a dropdown menu. The 'Next' button is highlighted in blue, and the 'Back' button is below it. At the bottom, it says 'Powered by DocuSign' and has links for 'Privacy and Terms'.

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Step 4

Action

Each form will vary and be based on the selected **Request Type** from the previous screen. Input the requested information and select **Next**.

Screen

Step 5

Action

Acknowledge the information being submitted is true and accurate, and documents have been uploaded to DocVault, when appropriate. Select **Next**.

Screen


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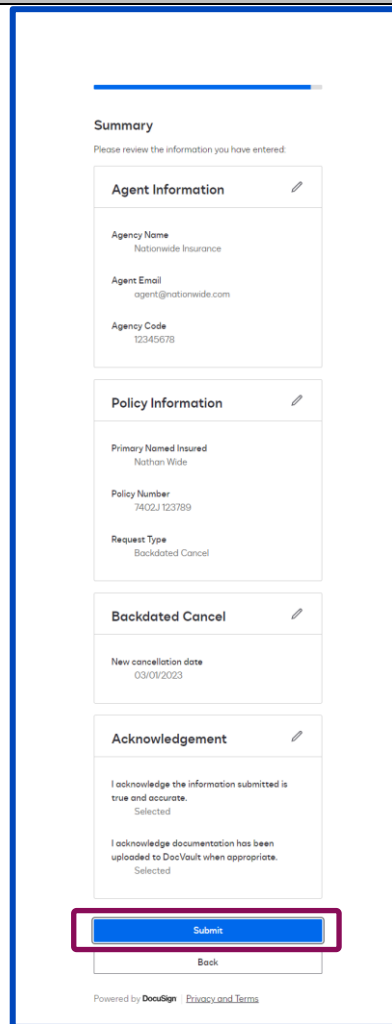


Step 6


Action

*Review the information being submitted. If edits are needed, select the pencil icon () to complete edits. Once finalized, select **Submit**.*

Screen




Summary
Please review the information you have entered

Agent Information 

Agency Name
Nationwide Insurance

Agent Email
agent@nationwide.com


Agency Code
12345678

Policy Information 


Primary Named Insured
Nathan Wide

Policy Number
7402/123789

Request Type
Backdated Cancel

Backdated Cancel 

New cancellation date
03/01/2023

Acknowledgement 

I acknowledge the information submitted is true and accurate.
☒ Selected

I acknowledge documentation has been uploaded to DocVault when appropriate.
☒ Selected

Submit

[Back](#)

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