

Nationwide Express: Establish Billing Plan & Finalize Quote



Establish Billing Plan

Step 1

Action	Screen
<p>The “Billing” subtab has you establishing the billing plan that works best for your customer. This will not collect the payment. It’s simply acknowledging the preferred method. The billing preferences can also be edited before binding.</p> <p>a. Notice on this example you see the mortgagee information displayed at the top since the homeowner policy is in escrow.</p> <p>b. If there is a discount associated with a particular pay plan, it will be indicated in blue as you see on the screen for “Recurring EFT” and “Pay in full”.</p> <p>c. Notice details around which payment plan may be better for the customer depending on telematics preferences.</p> <p>d. The “Finalize quote” button is unlocked.</p>	

Finalize Quote

Step 1

Action	Screen
<p>You may receive messages where Nationwide did not return a quote for both auto and homeowner. Thus, there is no underwriting approval; quote with another carrier.</p>	

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.

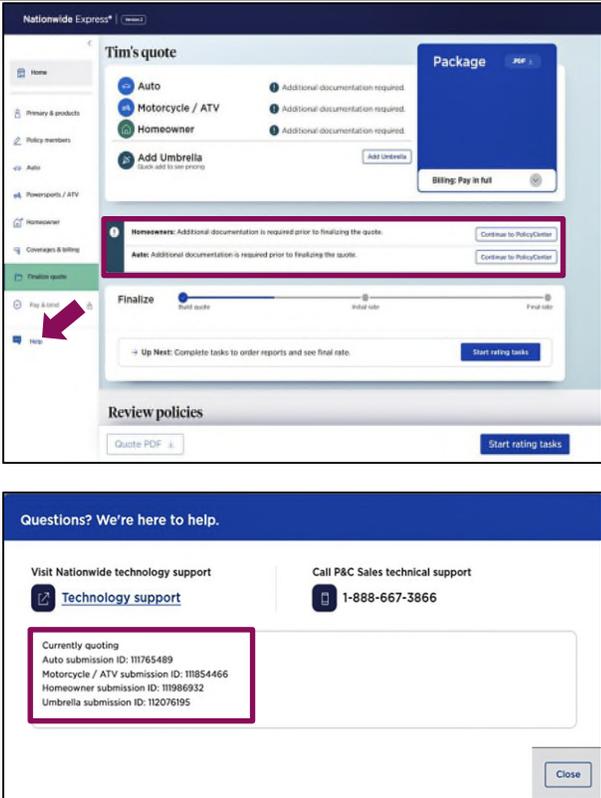
(2) I agree that the information contained in this training presentation is confidential and proprietary to Nationwide and may not be disclosed or provided to third parties without Nationwide's prior written consent.

(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.

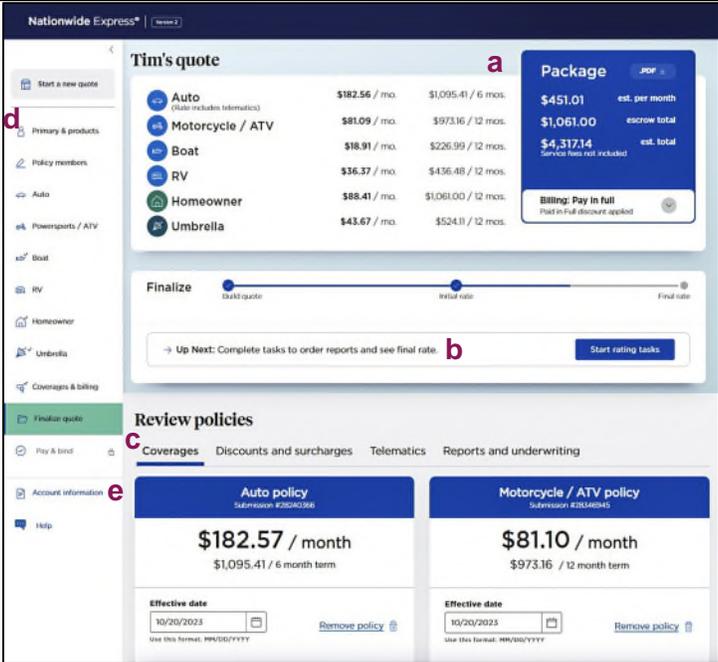
(4) I agree that I will return or destroy any material provided to me during this training, including any copies of such training material, when or if any of the following circumstances apply: (a) my Independent Sales Agent agreement with Nationwide is cancelled or I no longer hold any appointments with 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.

Finalize Quote (cont'd)

Step 2

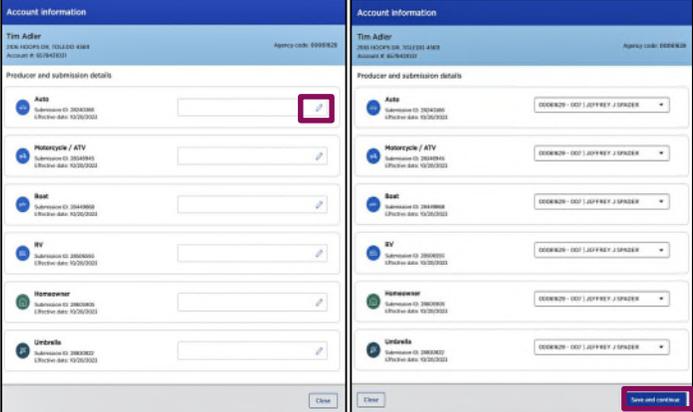
Action	Screen
<p>The message “Additional documentation is required prior to finalizing the quote” ask you to navigate to get pre-quote underwriting approval.</p> <p>Select “Help” to get the submission ID for each product. You will need them to submit your approval</p>	

Step 3

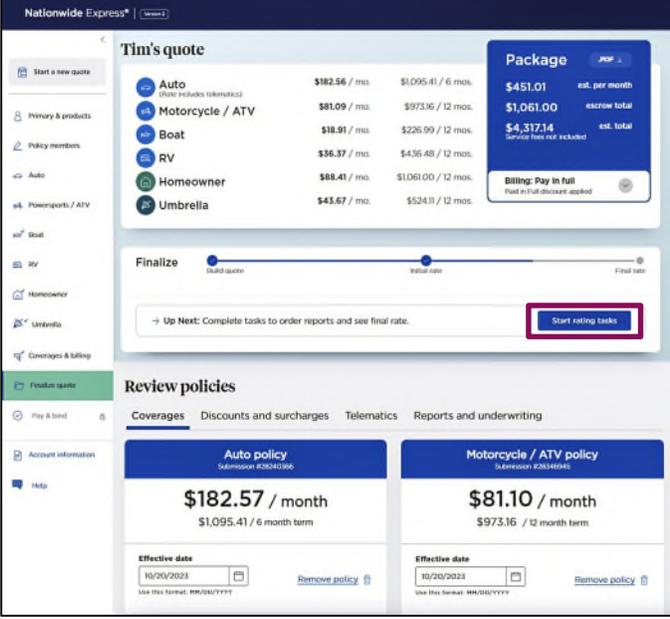
Action	Screen
<p>a. You are now on to the initial quote, whether this is where you initially landed or after your quote is approved from Underwriting. This is not a bindable rate. Depending on your state, the rates will populate once you get underwriting approval.</p> <p>b. You must complete rating tasks to move forward.</p> <p>c. You can also perform several actions from this page including refreshing reports, changing telematics enrollments, reviewing discounts and surcharges and making further adjustments to coverages.</p> <p>d. Note that navigation is open on the left. You can go anywhere you need to if changes are required.</p> <p>e. Also on the left navigation there is a tab labeled “Account information”.</p>	

Finalize Quote (cont'd)

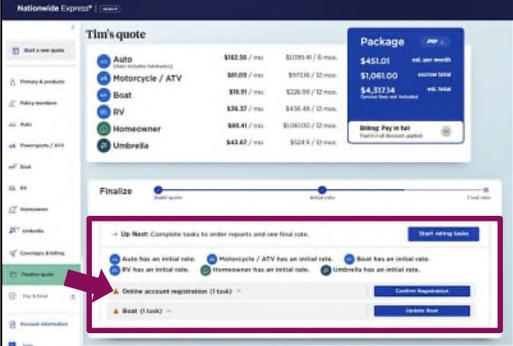
Step 4

Action	Screen
<p>When you select the “Account information” tab, it will open up an additional window to update producer info as needed. Simply select the  icon.</p> <p>Once you make the necessary updates, select the “Save and continue” button</p>	

Step 5

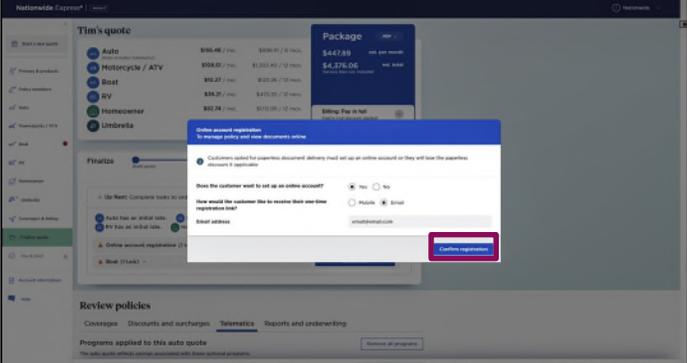
Action	Screen
<p>If you don't already have it quoted, you can add a PUL on this screen. Nationwide Express automatically adjusts the underlying limits as needed.</p> <p>Again, in the tabs below “Review policies”, you can easily navigate to edit coverages or discounts, add or remove telematics, and review or order reports.</p> <p><u>If you opt to go to PolicyCenter for any reason, close the Nationwide Express quote to avoid any issues with the quote.</u> Communication is two-way, and it gets garbled if both platforms are open while you're making changes.</p> <p>You can change the pay plan here, but you'll need to requote because of discounts.</p> <p>If the customer is ready to proceed, select the “Start rating tasks” button.</p>	

Step 6

Action	Screen
<p>Rating tasks will advise of what is missing or needed to proceed.</p> <p>Online account registration is what most often populates. Select the “Confirm Registration” button.</p>	

Finalize Quote (cont'd)

Step 7

Action	Screen
<p>Answer the “Online account registration” questions and select the “Update registration” button.</p>	

Step 8

Action	Screen
<p>If your customer wants to discuss the quotes with their spouse/partner, you can provide PDF quote examples with detailed information for their review.</p>	