

# Create an Activity to Processing

## PolicyCenter



### Description:

This job aid is broken into two sections:

- [Section 1 – Create an Activity to Processing](#)
- [Section 2 – Create an Activity to Reply to Processing](#)

### Background:

There are multiple options to choose from when creating an activity to Processing. Use the chart below to determine which option is appropriate to the situation.

Option	Situation
<b>Add/Resent SR22</b>	Use for Auto policy SR22/FR44 requests.
<b>Backdate a Policy Change</b>	Use for previously processed changes when the policy needs to be backdated further than you can process.
<b>New Credit Report for Next Renewal</b>	Use only if the customer has requested a new credit report to be ordered on the policy.
<b>Policy Change</b>	Use for a policy change or policy cancellation request the Agent is unable to process.
<b>Reinstate Policy</b>	Use to request a policy reinstatement or request a rewrite new-term (reactivation) the Agent is unable to process.

## Create an Activity to Processing

### Step 1

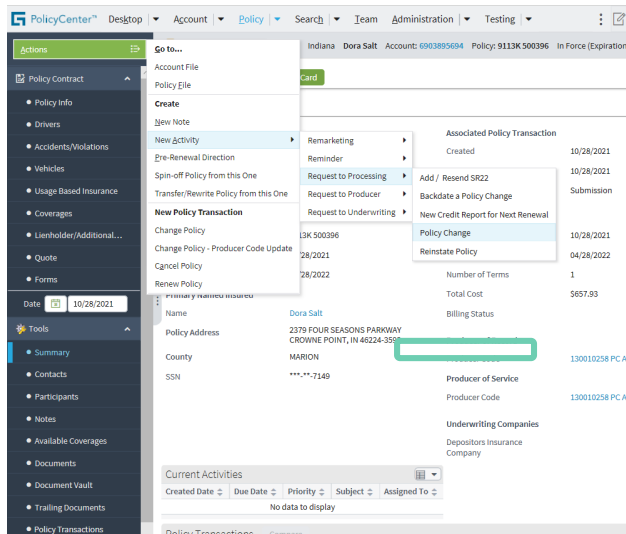
#### Action

Access the appropriate policy to create an activity in PolicyCenter.

In this example, you will create an activity to Processing to request a policy flat cancellation.

- Select the **Actions** button.
- Select **New Activity > Request to Processing > Policy Change** from the drop-down menu.

#### Screen



### Step 2

#### Action

In the *New Activity* section, enter the activity details.

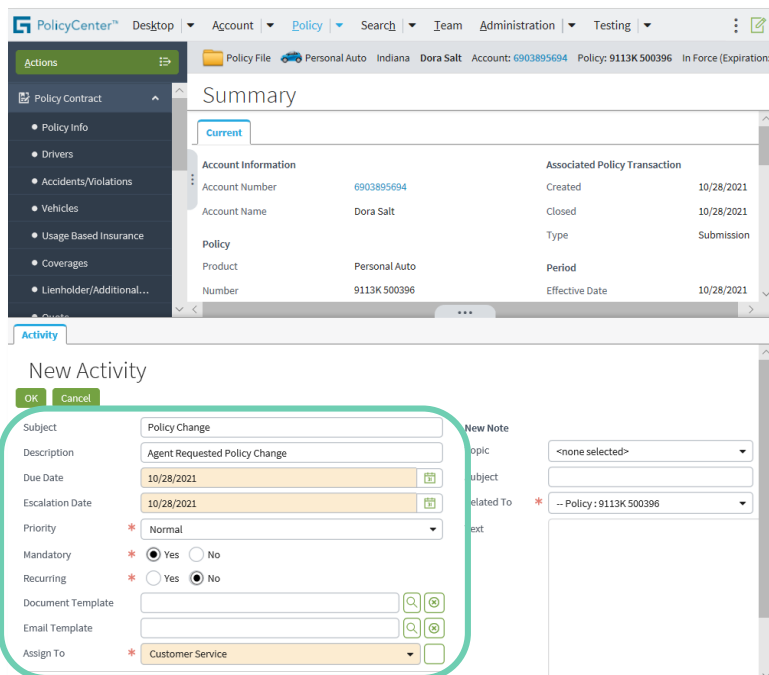
On the left side of the *New Activity* section, most fields default, but can be updated if necessary.

- **Subject:** defaults based on the activity selected.

**NOTE:** Do not edit the information in the **Subject** field. Doing so will cause the Activity to misroute and not be processed.

- **Description:** defaults based on the activity selected.
- **Assign To:** defaults to "Customer Service". Leave this default, as it will route to the correct area based on the selected activity.

#### Screen



## Job Aid Process (Create an Activity Cont.) :

### Step 3

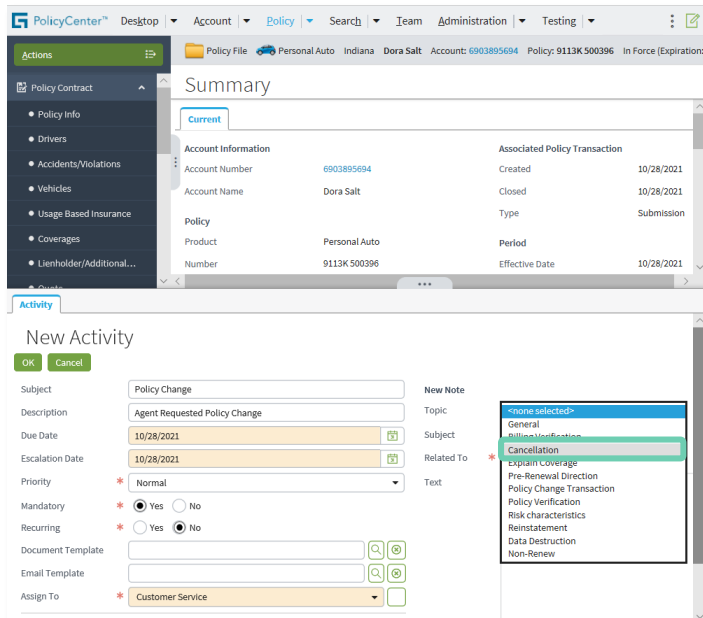
#### Action

In the *New Activity* section, note details are entered about the activity/request. Ensure you provide the information required by Processing to streamline the handling of the request.

In this example, you will request a flat cancellation of a policy.

- From the **Topic** drop-down list, select **"Cancellation"**.

#### Screen



The screenshot shows the PolicyCenter Desktop interface. The 'New Activity' form is open, and the 'Topic' dropdown menu is expanded, showing 'Cancellation' as the selected option. The form includes fields for Subject, Description, Due Date, Escalation Date, Priority, Mandatory, Recurring, Document Template, Email Template, and Assign To. The 'Associated Policy Transaction' table shows details for Account Number 6903895694, Account Name Dora Salt, Policy Product Personal Auto, and Policy Number 9113K 500396.

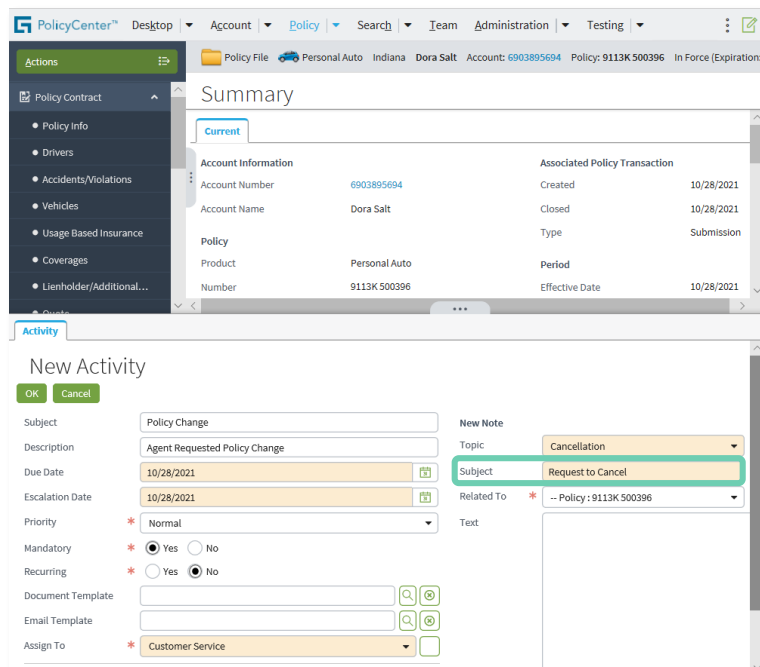
### Step 4

#### Action

To open the text box for entry, you must enter an appropriate **Subject** line.

- In this example, enter **"Request to Cancel"** in the Subject field.

#### Screen



The screenshot shows the PolicyCenter Desktop interface. The 'New Activity' form is open, and the 'Subject' field is highlighted with a green border, containing the text 'Request to Cancel'. The 'Topic' dropdown is still open, showing 'Cancellation' as the selected option. The form includes fields for Subject, Description, Due Date, Escalation Date, Priority, Mandatory, Recurring, Document Template, Email Template, and Assign To. The 'Associated Policy Transaction' table shows details for Account Number 6903895694, Account Name Dora Salt, Policy Product Personal Auto, and Policy Number 9113K 500396.

## Job Aid Process (Create an Activity Cont.) :

### Step 5

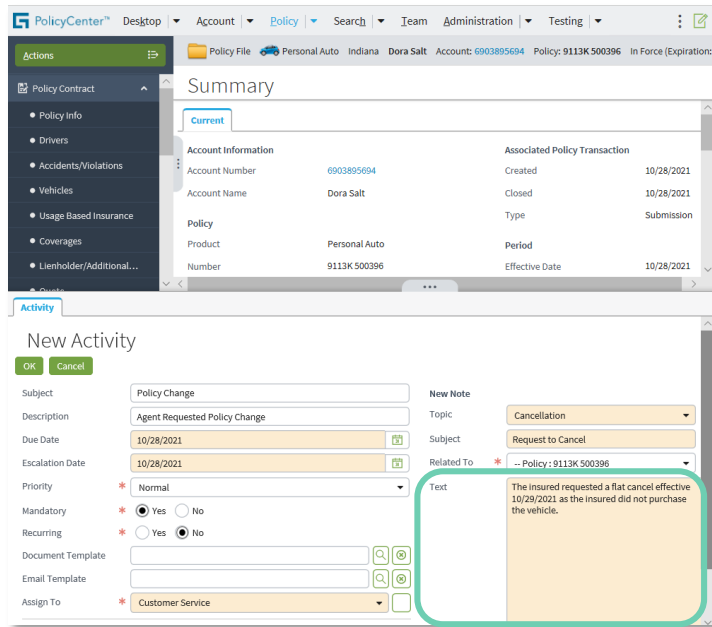
#### Action

The **Text** field provides additional information, including:

- **Who** is requesting the action.
- **When** the action should be completed.
- **Why** the action is requested.

In this example: Enter ***“The insured requested a flat cancel effective 10/29/2020 as the insured did not purchase the vehicle”*** in the **Text** field.

#### Screen



PolicyCenter Desktop | Account | Policy | Search | Team | Administration | Testing

Policy File | Personal Auto | Indiana | Dora Salt | Account: 6903895694 | Policy: 9113K 500396 | In Force (Expiration: 10/28/2021)

### Summary

Current

Account Information		Associated Policy Transaction	
Account Number	6903895694	Created	10/28/2021
Account Name	Dora Salt	Closed	10/28/2021
Policy		Type	Submission
Product	Personal Auto	Period	
Number	9113K 500396	Effective Date	10/28/2021

### Activity

#### New Activity

OK Cancel

Subject: Policy Change

Description: Agent Requested Policy Change

Due Date: 10/28/2021

Escalation Date: 10/28/2021

Priority: Normal

Mandatory: ☒ Yes ☐ No

Recurring: ☐ Yes ☒ No

Document Template: [Select]

Email Template: [Select]

Assign To: Customer Service

New Note

Topic: Cancellation

Subject: Request to Cancel

Related To: Policy: 9113K 500396

Text: The insured requested a flat cancel effective 10/29/2021 as the insured did not purchase the vehicle.

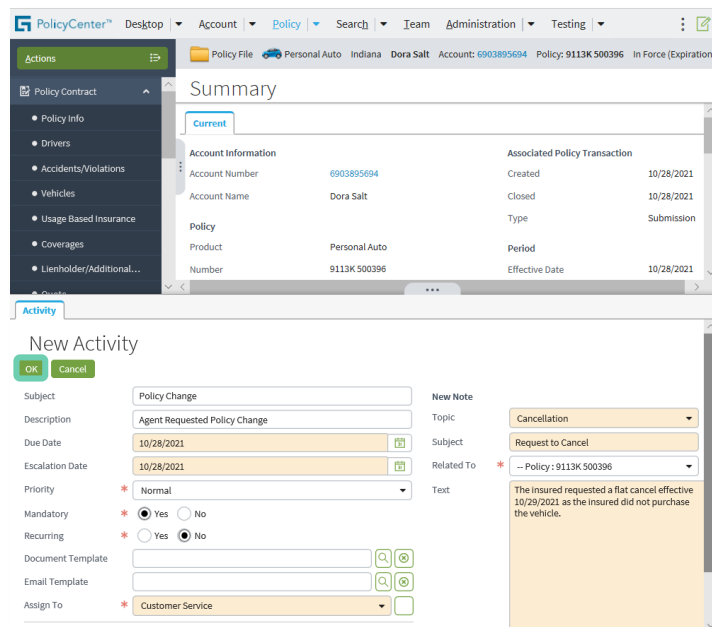
### Step 6

#### Action

When you have entered all the information needed for the Processing team to process the cancellation:

- Select the **OK** button.

#### Screen



PolicyCenter Desktop | Account | Policy | Search | Team | Administration | Testing

Policy File | Personal Auto | Indiana | Dora Salt | Account: 6903895694 | Policy: 9113K 500396 | In Force (Expiration: 10/28/2021)

### Summary

Current

Account Information		Associated Policy Transaction	
Account Number	6903895694	Created	10/28/2021
Account Name	Dora Salt	Closed	10/28/2021
Policy		Type	Submission
Product	Personal Auto	Period	
Number	9113K 500396	Effective Date	10/28/2021

### Activity

#### New Activity

OK Cancel

Subject: Policy Change

Description: Agent Requested Policy Change

Due Date: 10/28/2021

Escalation Date: 10/28/2021

Priority: Normal

Mandatory: ☒ Yes ☐ No

Recurring: ☐ Yes ☒ No

Document Template: [Select]

Email Template: [Select]

Assign To: Customer Service

New Note

Topic: Cancellation

Subject: Request to Cancel

Related To: Policy: 9113K 500396

Text: The insured requested a flat cancel effective 10/29/2021 as the insured did not purchase the vehicle.

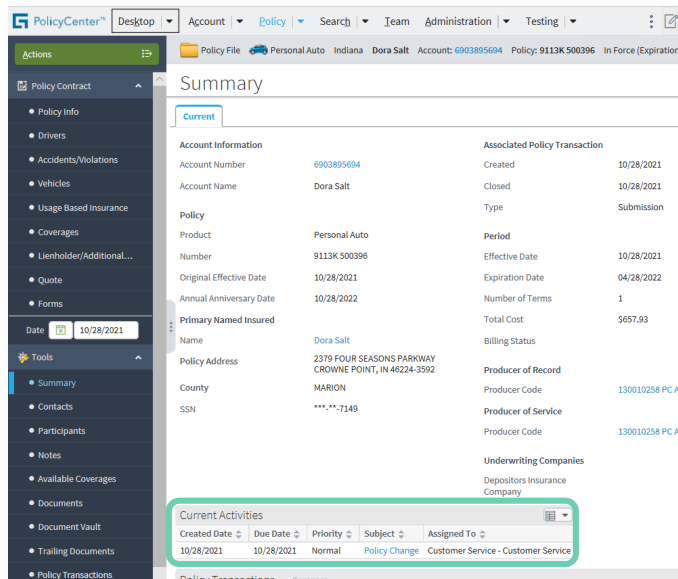
## Job Aid Process (Create an Activity Cont.) :

### Step 7

#### Action

On the *Summary* screen, you can view the current activities on the policy in the *Current Activities* section. The activity you created will appear in this section.

#### Screen



### Step 8

#### Action

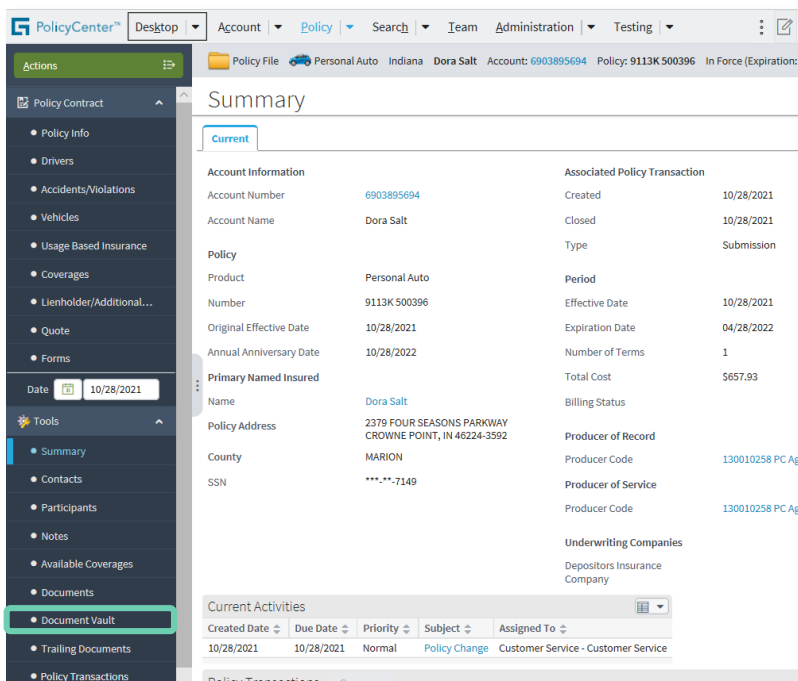
If the request requires additional documentation, use the **Document Vault** link to upload any supporting documents or trailing document information.

The **Document Vault** link takes you to the policy in DocVault to complete the upload.

For example, if the request includes backdating the removal of a vehicle, proof the vehicle was sold would need to be uploaded to Doc Vault.

Uploading additional documentation immediately streamlines the completion of the request to Processing.

#### Screen



## Create an Activity to Reply to Processing

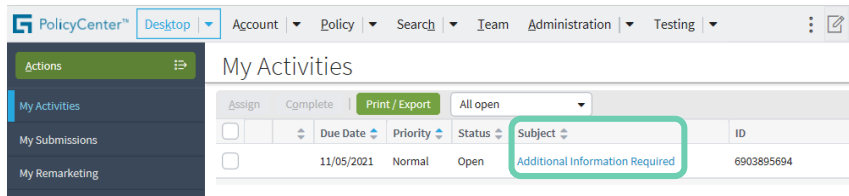
### Step 1

#### Action

Activities assigned to you display on your *Desktop*.

- To open the activity, Select the “**link**” in the **Subject** column.

#### Screen



### Step 2

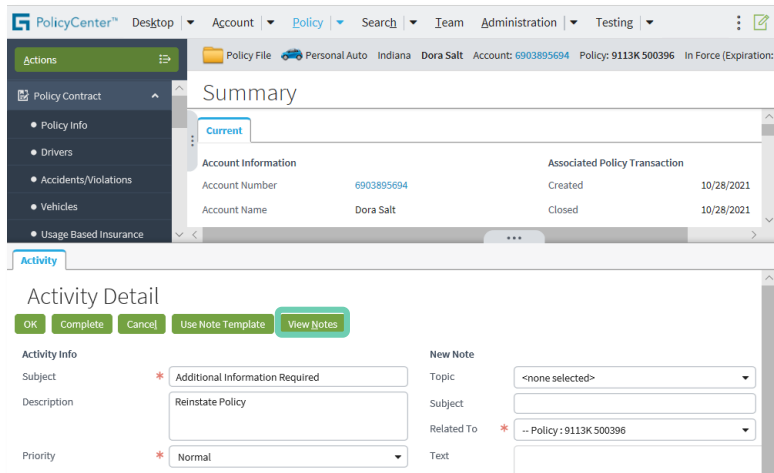
#### Action

In this example, the Processor has requested additional information to reinstate the policy.

To view any notes about this activity:

- Select the **View Notes** button.

#### Screen



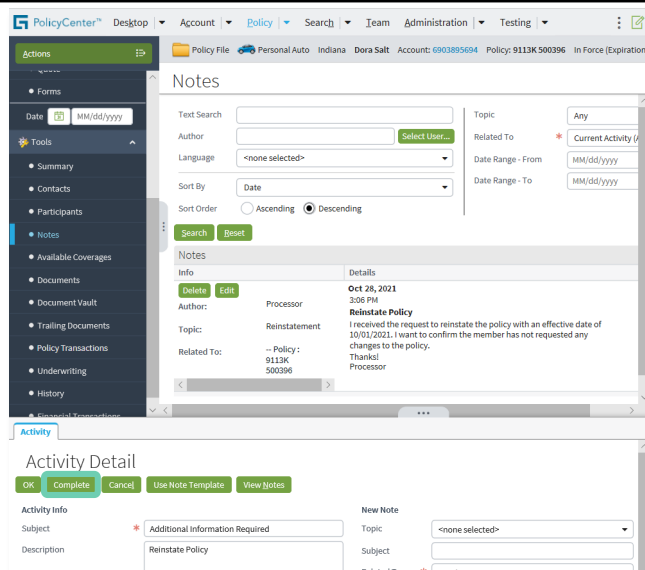
### Step 3

#### Action

To reply to the Processor, you will need to complete the original Activity and create a new one.

- Select the **Complete** button to close and complete the activity sent by Processing to request additional information.

#### Screen



## Job Aid Process (Reply to Processing Cont.) :

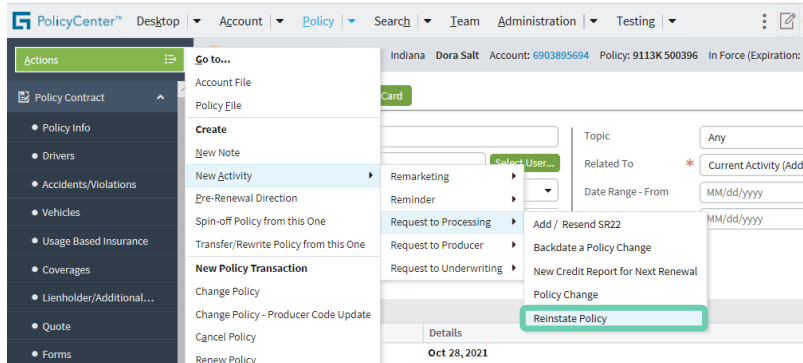
### Step 4

#### Action

To create an activity in PolicyCenter:

- Select the **Actions** button.
- Select **New Activity > Request to Processing > Reinstate Policy** from the drop-down menu.

#### Screen



### Step 5

#### Action

The **New Activity** section displays at the bottom of your screen.

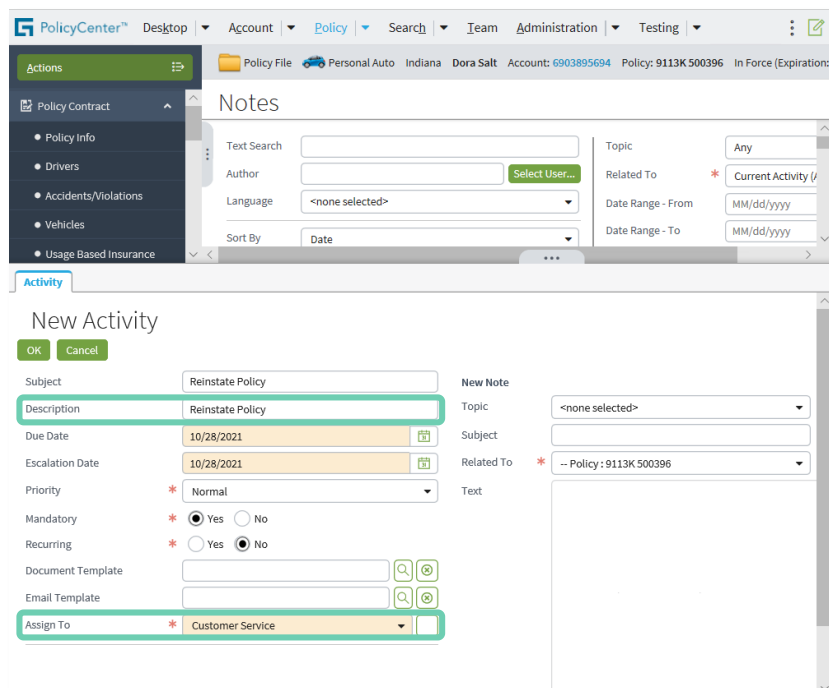
To indicate you are replying to an Underwriting request, enter the information as shown.

- Enter a brief description in the **Description** field.

**Note:** Some fields are defaulted. For example, the **Subject** and **Description** fields. You can change these fields as necessary.

- The **Assign To** field defaults to **Customer Service**.

#### Screen



## Job Aid Process (Reply to Processing Cont.) :

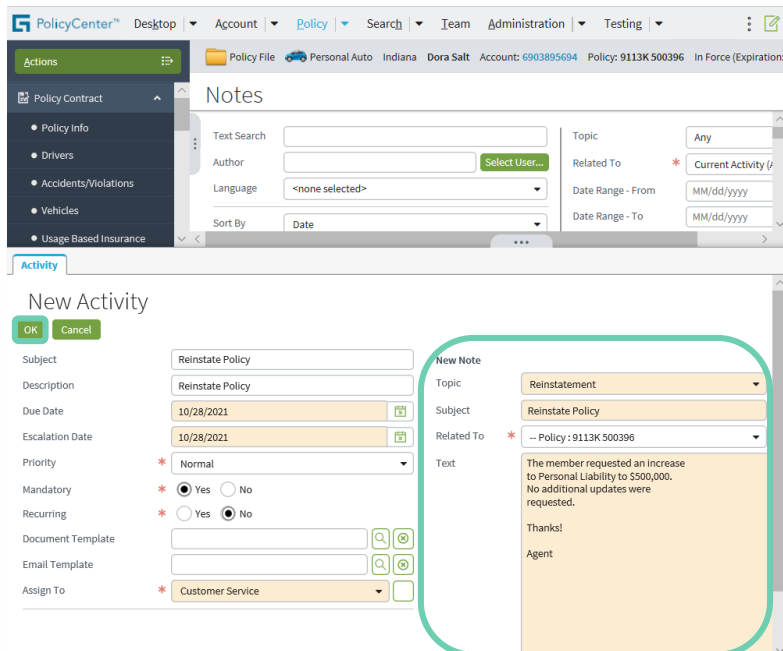
### Step 6

#### Action

To complete the *New Note* section:

- Enter the desired information in the fields:
  - Topic**
  - Subject**
  - Text**
- Select the **OK** button.

#### Screen



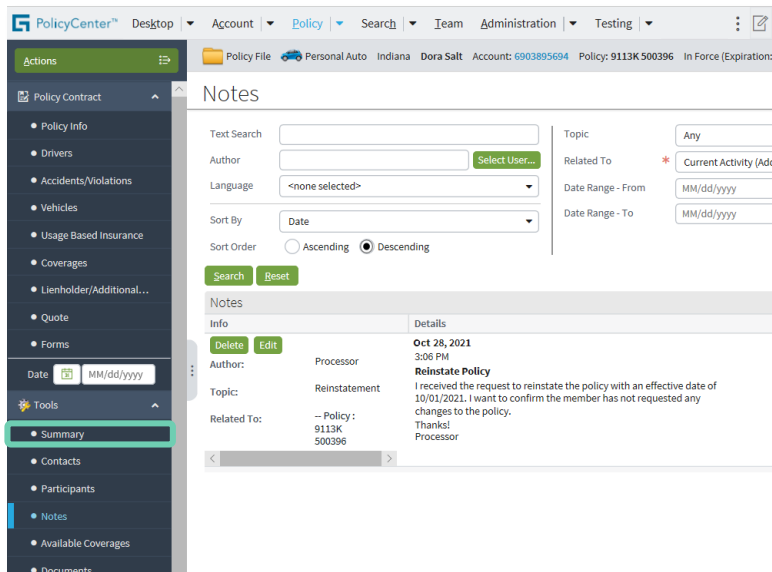
### Step 7

#### Action

Once you have sent the activity, return to the *Summary* screen to view the *Current Activities* section.

- Select the **Summary** link.

#### Screen





## Job Aid Process (Reply to Processing Cont.) :

### Step 8

#### Action

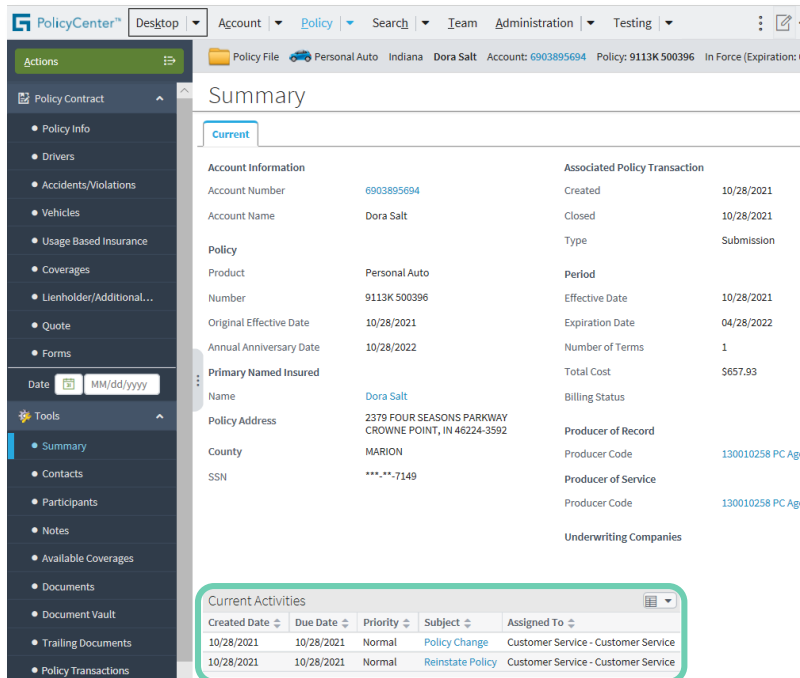
On the *Summary* screen:

- Scroll down to view the *Current Activities* section on the policy.

In the *Current Activities* section, the recently-created activity displays.

The recently-created note also displays in the *Notes* section on the *Summary* screen.

#### Screen



**PolicyCenter** Desktop | Account | Policy | Search | Team | Administration | Testing

Policy File | Personal Auto | Indiana | Dora Salt | Account: 6903895694 | Policy: 9113K 500396 | In Force (Expiration: 10/28/2022)

### Summary

**Current**

Account Information		Associated Policy Transaction	
Account Number	6903895694	Created	10/28/2021
Account Name	Dora Salt	Closed	10/28/2021
Policy		Type	Submission
Product	Personal Auto	Period	
Number	9113K 500396	Effective Date	10/28/2021
Original Effective Date	10/28/2021	Expiration Date	04/28/2022
Annual Anniversary Date	10/28/2022	Number of Terms	1
Primary Named Insured		Total Cost	\$657.93
Name	Dora Salt	Billing Status	
Policy Address	2379 FOUR SEASONS PARKWAY CROWNE POINT, IN 46224-3592	Producer of Record	
County	MARION	Producer Code	130010258 PC Ag
SSN	***-**-7149	Producer of Service	
		Producer Code	130010258 PC Ag
		Underwriting Companies	

**Current Activities**

Created Date	Due Date	Priority	Subject	Assigned To
10/28/2021	10/28/2021	Normal	Policy Change	Customer Service - Customer Service
10/28/2021	10/28/2021	Normal	Reinstate Policy	Customer Service - Customer Service

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