

# Agent Center to PolicyCenter Cross Reference Guide



## Description

The purpose of the **Agent Center Cross-Reference Guide** is to provide you with an easy to navigate document to help you understand how Agent Center interacts with PolicyCenter.

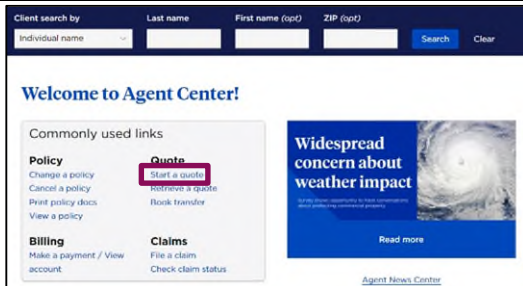
This guide provides you with five (5) scenarios linking you from Agent Center to PolicyCenter:

- [Brand New Customer](#)
- [Existing Agent Center Customer but No PolicyCenter Account or Policy](#)
- [Existing Agent Center Customer with Existing PolicyCenter Account and Policy](#)
- [Direct Link from Agent Center to PolicyCenter Desktop](#)
- [Direct Link from Agent Center to PolicyCenter for a Policy Change](#)

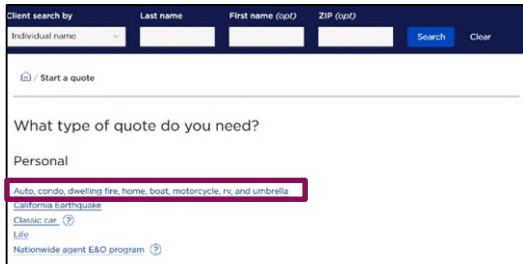
## Scenario 1 – Brand New Customer

Background: Use this procedure when a prospect calls, is not an existing customer, and has neither a policy nor an account in Agent Center or PolicyCenter.

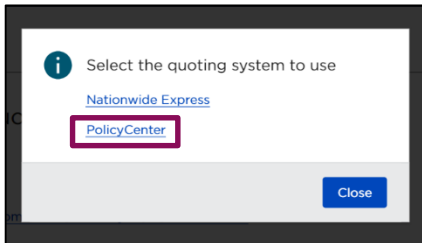
### Step 1

Action	Screen
On the Agent Center Workspace home screen, “Commonly used links”: <ul style="list-style-type: none"><li>• Select “Start a Quote”.</li></ul>	

### Step 2

Action	Screen
On the “Start a Quote” screen you are asked “What type of quote do you need?” <ul style="list-style-type: none"><li>• Under the “Personal” section, select “Auto, condo, dwelling fire, home, boat, motorcycle, rv and umbrella”.</li></ul>	

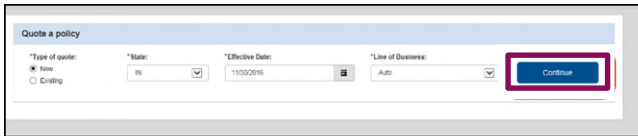
### Step 3

Action	Screen
You can create the quote through Nationwide Express OR directly in the PL PolicyCenter system. <ul style="list-style-type: none"><li>• From the pop-up box, “Select the quoting system to use”, select “PolicyCenter” (for this exercise).</li></ul>	

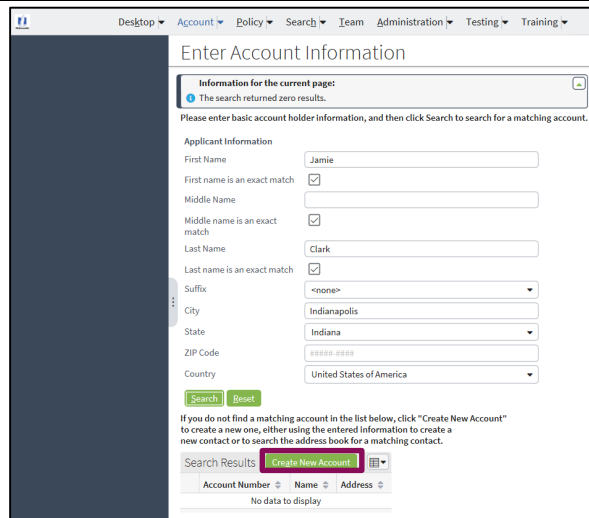


## Scenario 1 – Brand New Customer (cont'd)

### Step 4

Action	Screen
<p>If the customer is not found, complete the required fields:</p> <ul style="list-style-type: none"> <li>New</li> <li>State</li> <li>Effective Date</li> </ul> <ul style="list-style-type: none"> <li>Select the “Continue” button.</li> </ul>	

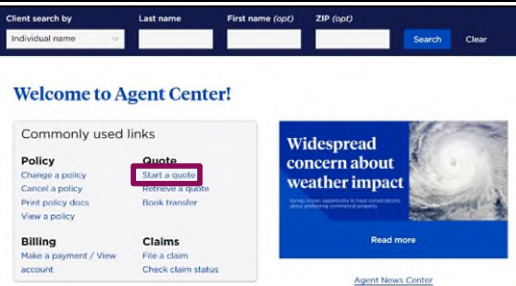
### Step 5

Action	Screen
<p>The first entry point is the “Enter Account Information” screen when accessing Policy Center from Agent Center using this procedure.</p> <p>No account information is in PolicyCenter because this is a brand-new client:</p> <ul style="list-style-type: none"> <li>Select the “Create New Account” button.</li> </ul>	

## Scenario 2 – Existing Agent Center Client with No PolicyCenter Account or Policy

Background: Use this procedure when an existing Agent Center customer calls but has no PolicyCenter account or policy.

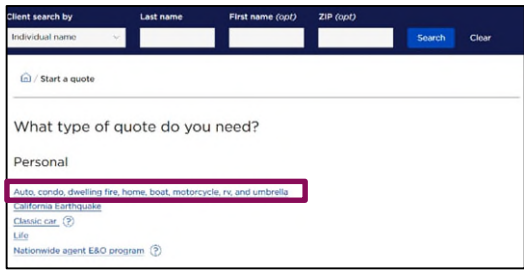
### Step 1

Action	Screen
<p>On the Agent Center Workspace home screen, “Commonly used links”:</p> <ul style="list-style-type: none"> <li>Select “Start a Quote”.</li> </ul>	

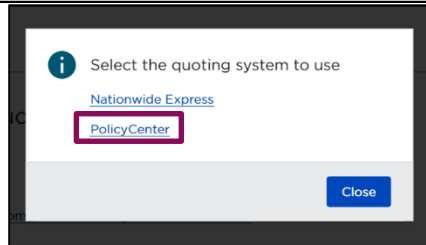


## Scenario 2 – Existing Agent Center Client with No PolicyCenter Account or Policy (cont'd)

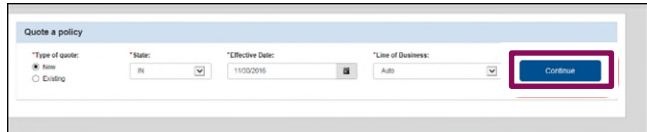
### Step 2

Action	Screen
<p>On the “Start a Quote” screen you are asked “What type of quote do you need?”</p> <ul style="list-style-type: none"> <li>Under the “Personal” section, select “Auto, condo, dwelling fire, home, boat, motorcycle, rv and umbrella”.</li> </ul>	

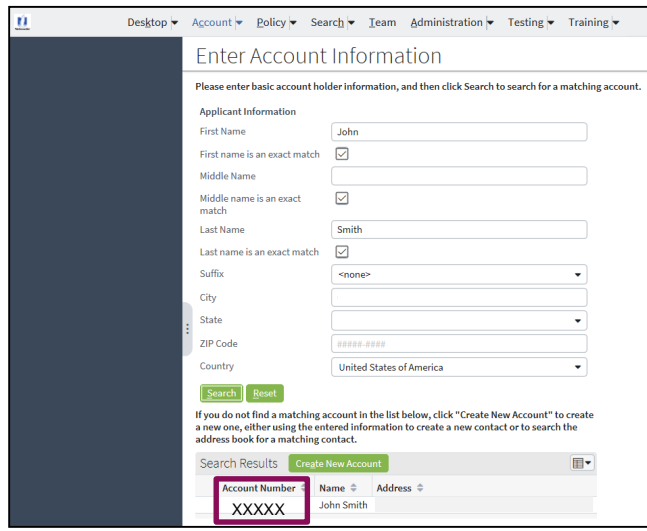
### Step 3

Action	Screen
<p>A pop-up screen appears asking you to “Select the quoting system to use”.</p> <p>For this exercise, select “PolicyCenter”.</p>	

### Step 4

Action	Screen
<p>If the customer is not found, complete the required fields:</p> <ul style="list-style-type: none"> <li>New</li> <li>State</li> <li>Effective Date</li> </ul> <ul style="list-style-type: none"> <li>Select the “Continue” button.</li> </ul>	

### Step 5

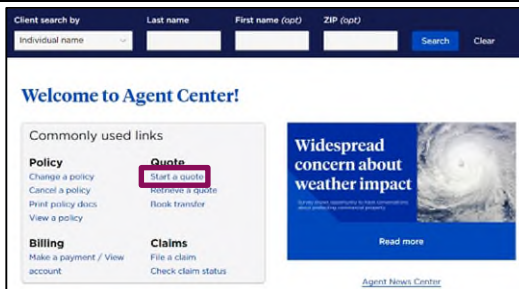
Action	Screen
<p>The second entry point is the “Enter Account Information” screen, when accessing PolicyCenter from Agent Center using this procedure.</p> <ul style="list-style-type: none"> <li>Select the “Account Number” to go to the “Account File Summary” screen in PolicyCenter and create a new submission</li> </ul>	



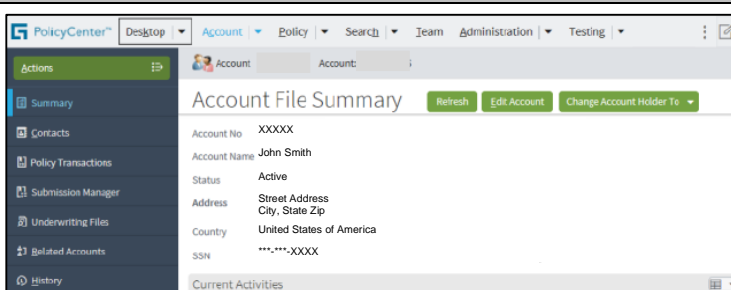
## Scenario 3 – Existing Agent Center Client with Existing PolicyCenter Account and Policy

Background: Use this procedure when a policyholder calls and is an existing Agent Center customer and has an existing PolicyCenter account and policy.

### Step 1

Action	Screen
<p>On the Agent Center Workspace home screen, “Commonly used links”:</p> <ul style="list-style-type: none"> <li>Select “Start a Quote”.</li> </ul>	

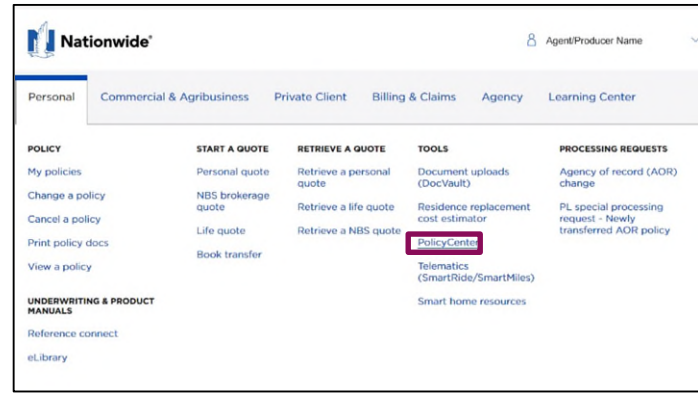
### Step 2

Action	Screen
<p>The customer’s “Account File Summary” screen in PolicyCenter displays.</p>	

## Scenario 4 – Direct Link from Agent Center to PolicyCenter Desktop

Background: Use this procedure when a policyholder calls and already is an existing Agent Center customer and has an existing PolicyCenter account and policy.

### Step 1

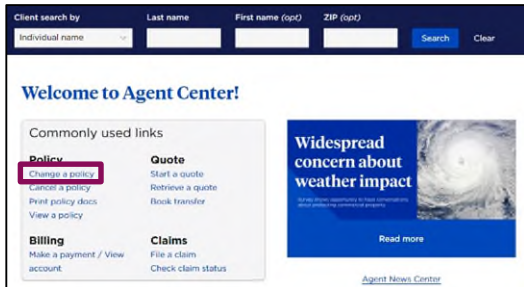
Action	Screen
<p>To use the direct link from Agent Center to PolicyCenter Desktop:</p> <ul style="list-style-type: none"> <li>Under the “Personal” tab, “Tools” section, select “PolicyCenter”.</li> </ul>	



## Scenario 5– Direct Link from Agent Center to PolicyCenter for a Policy Change

Background: Use this procedure when an existing policy in PolicyCenter needs to be updated.

### Step 1

Action	Screen
<p>On the Agent Center Workspace home screen, “Commonly used links”:</p> <ul style="list-style-type: none"> <li>Under the “Policy” section, select “Change a policy”.</li> </ul>	 <p>The screenshot shows the Agent Center Workspace home screen. At the top, there is a search bar with fields for 'Last name', 'First name (opt)', and 'ZIP (opt)', along with a 'Search' button and a 'Clear' button. Below the search bar, the heading 'Welcome to Agent Center!' is displayed. Underneath, the 'Commonly used links' section is shown, which is divided into three columns: 'Policy', 'Quote', and 'Claims'. In the 'Policy' column, the 'Change a policy' link is highlighted with a red box. Other links in the 'Policy' column include 'Cancel a policy', 'Print policy docs', and 'View a policy'. The 'Quote' column contains 'Start a quote', 'Retrieve a quote', and 'Book transfer'. The 'Claims' column contains 'File a claim' and 'Check claim status'. To the right of the links, there is a featured article titled 'Widespread concern about weather impact' with a 'Read more' button. At the bottom right, the 'Agent News Center' link is visible.</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.

