Description and Background

This job aid provides the steps to combine a split vehicle policy with a primary/original auto policy.

A customer may have two auto policies: one parent or original auto policy and one split vehicle policy, and may no longer need both policies (i.e. member removed a vehicle or vehicles, and now has fewer vehicles, no longer needing a split vehicle policy).

You can start this process from any Auto policy on the Account. Typically, you should move the vehicles to the policy with the best features. Once merged, the policy from which vehicles were moved must then be cancelled.

Step 1 Action Screen Navigate to the policy on which all vehicles will Desktop | • Account | • Policy | • Search | • Team Administration | • Testing | • n : 70 6 be combined. Indiana Sabrina Salt Account: 9859315392 Policy: 9113J 900025 In Force (Exp. 10/ Go to... Account File Card Reliev Contract Policy File Note: Begin the process from the policy on the Policy Info Create Account with the best features. This can be New Note Drivers Associated Policy Transaction New <u>A</u>ctivity either the original policy or the split vehicle Accidents/Violation 0215202 Created 04/26/2022 Pre-Renewal Direction Vehicles orina Salt Closed 04/26/2022 policy. Spin-off Policy from this On Type Submission Transfer/Rewrite Policy from this One New Policy Transaction sonal Auto Period From the Auto policy you plan to keep: Lienholder/Additie Change Policy Effective Date 13J 900025 04/26/2022 Change Policy - Producer Code Update 26/2022 Expiration Date 10/26/2022 Cancel Policy 26/2023 Number of Terms Select Actions Renew Policy Total Cost \$3,013.07 Date 🗊 04/26/2021 PHILIDALY Select Change Policy from the dropdown Name Sabrina Salt \$3,013.07 Full Term Premium 2379 FOUR SEASONS PK CROWN POINT, IN 46307 Policy Address list Billing Status -9342 County PORTER Producer of Record Step 2 Action Screen On the Start Policy Change screen, the Effective Date field defaults to the current Desktop | • Account | • Policy | • Search | • Team Administration | • Testing | • Ú. : 7 (date: Policy File 🚓 Personal Auto Indiana Sabrina Salt Account: 9859315392 Policy: 9113J 900025 In Force (Exp. 10/2 Start Policy Change Cancel Policy Contract

Policy Info

* 04/26/2022

1

Effective Date

• Enter the appropriate information in the **Effective Date** field

Select Next	



Step 3	
Action	Screen
 On the <i>Policy Info</i> screen: Select Actions Select Copy Data 	1 Desktop Account Policy Search Ieam Administration Testing Ieam Administration Actions E Co to ange (Pending) Personal Auto Indiana Effective: 04/26/2022 Sabrina Salt Account: 9859315392 Policy Policy Change 10519000 Policy File Info Next> Quote Withdraw Transaction View Bill Calculator Policy Change 10519000 Policy File Insured Change To: View Activity Form Type 6 months Policy Info Ewe Activity Change To: View Activity Term Type 6 months Accidents/Violations Effective Date Cory Data 2376 FOUR SEASONS PKWY Effective Date 04/26/2022 CONTRE Contract Effective Date 04/26/2022 Expiration Date 10/26/2022
Step 4 Action	Screen
 PolicyCenter automatically defaults to the Account level and populates the Account Number fields with the client's account number on the Copy Policy Search Policy screen. Select Search 	Desktop • Account • Policy • Search • Jean Administration • Testing • : • • • • • • • • • • • • • • • • •
Step 5	O erreen
Action	Screen
 On the Copy Policy Search Policies screen: Select the Select button in the Search 	D Desgtop • Account • Bolicy • Search • Team Administration • Testing • : © @ Policy Change 10519000 Personal Auto Indiana Effective: 64/26/2022 Sabrina Salt Account: 9859315392 Polic Copy Policy Search Policies Return to Policy Info

 Select the Select button in the Search Results section for the In Force (current term) policy from which the vehicles will be moved







Step 6

Action

On the Select data to copy from Policy XXXX screen:

• Select drivers not currently on the policy to which you are moving the vehicles

Note: You do not need to select drivers if they are already included on both policies. However, if there are drivers on the split policy who are not listed on the primary/original policy, they will need to be added at this time.

- Under **Vehicles**, select the vehicles in the selected policy
- Select **Include All Coverages**; do not select individual coverages which display once you have selected the vehicle
- Select Merge to Transaction

Note: To bring over lienholder or lease information, select Include Additional Interests, as needed.



Step 7

Action	Screen				
The system automatically copied the data to the currently-open policy and re-displays the Policy Info screen	Des <u>k</u> top Actions I∋	▼ Account ▼ Policy ▼ ✓ Policy Change (Pending) ●	Searc <u>h</u> ▼ _ Ieam _ Administration → Personal Auto Indiana Effective: 04/2	on ▼ Testing ▼ 16/2022 Sabrina Salt Accoun	: 9859315392 Polic
	Policy Change 10519000 Pending	Policy Into Ne	ext > Quote Withdraw Transaction	View Bill Calculator	
Select Vehicles on the left	Policy Contract Policy Info Drivers	Primary Named Insured Name Policy Address	Change To: Sabrina Salt Change To:	Policy Details Term Type Number of Terms	6 months 1
	Accidents/Violations	County Business Type	2379 FOUR SEASONS PKWY CROWN POINT, IN 46307-9342 PORTER New Business	Effective Date Expiration Date Rate State	04/26/2022 10/26/2022 Indiana
	Coverages	Secondary Named Insured		Discounts Easy Pay Sign Up	* _ Yes _ N
	Policy Review	Are there additional auto policies in the household insured	Ves No	Paperless Policy	Yes Yes Yes





Step 8

Action				Sc	cree	n		
The Vehicles screen shows the previous four vehicles on this policy, plus the vehicles from	Desktop Actions I∋	Account Po Policy Change (Pe Account Policy Change (Pe Account Account Account Policy Change (Pe Account Account Account Account Policy Change (Pe Account A	licy	<u>T</u> eam <u>A</u> dmin 10 Indiana Effectiv	istration -	Testing ▼ Sabrina Salt A	ccount: 985931	: 🛛 🤅
the merged Split Vehicle policy:	Policy Change 10519000 Pending Policy Contract	Venicle Details Create Vehicle	< Back Next > (Quote Withdraw	Transaction	Yiew Bill Calcul	itor	
 Verify all details for each vehicle added. Depending on the state, additional 	Policy Info Drivers Accidents, Violations	Vehicle # ≑ 1 2 3	Vehicle Type Private Passenger Private Passenger Private Passenger	Model Year 2014 2014 2013	Make \$ CHEV HYUN AUDI	Model CAMARO SS SANTA FE G A5 2.0 QU	VIN \$ 2G1FS1EW6E KM8SN4HF0E WAURFAFRX	9213032 EU046305 DA007584
information may be required	Usage-Based Insurance Coverages Lienholder/Additional Interest	4 5 6	Private Passenger Private Passenger Private Passenger	2012 2011 2012	VOLK HOND FORD	CC LUX PILOT EX E-350 SUP	WWWHN7ANX 5FNYF4H65B 1FBSS3BL1C	CE501010 B001764 DB20466
Select Usage-Based Insurance on the left	Usage-Based Insurance on the left Underwiting Policy Review Which Peter Vertex Policy Review Which Peter Vertex Policy Review Vertex Po		Iasic Vehicle Information Iehicle # 1 Iehicle Type Private Passenger		Garaged At Location Name Vehicle Territory Code		* 1: 2379 FOUR SEAS	
	Tools ^	VIN Model Year	2G1F51EW6E92 2014	13032	Vehicle U Primary U	lse Jse	* Work	

Step 9	
Action	Screen
On the Usage-Based Insurance screen:	11 Destrop • Account • Policy • Search • Ieam Administration • Testing • :
Entor all Lisago-Based Insurance	Actions
information as needed. Telematics	Policy Enrollment Details Policy Enrollment Details
information does not copy over from the	Policy Mo Policy Program Vehicle Program Text Notification orxes Vehicle Enrollment Details
ропсу	Accdents/Voldstons Vehicle # 0 Vehicle Type S Model Vear C Made 0 Model 0 VIN 0 Device Compatible 0 Vehicle S Private Paramer 2014 CHEV CAMAR0 SS 2017515W65213302 Ves Vehicle S Private Paramer 2014 CHEV CAMAR0 SS 2017515W65213302 Ves
Select Coverages on the left	Coverages S Private Passenger 2013 AUDI A5 2.0 QU WAURFAFEXDA007584 Yes Ves Coverages S Private Passenger 2012 VOL CLUX WWHINTAVCC501010 Yes
	Lemboder/Additional linking 6 Private Passinger 2012 FORD E-330 SUP 1/BSSSBLICDB20468 Vies Underwriting E Device Compatible Vies
	Policy Review Instant Wrifed Discount No Connected Car No
	Tools Enrolled Program Enrolled •

Step 10

Action	Screen
On the Coverages screen:	Destatop
 Verify that all coverages were successfully copied from the policy Note: You may need to scroll to the right and/or down to view all coverage settings. 	Policy Change 10519000 Pending Policy Contract
 Select Lienholder/Additional Interest on the left 	Libeholder/Additional Interest Description Term Amount Description Inderwriting Roaddide Assistance Accident Forgiveness Image: Constraint of Constraints Image: Constraints
	Indes Verificite Lever Cutverlages verificate verificate Lever Cutverlages verificate





Step 11

Action				S	cree	en	
On the Lienholder/Additional Interest screen:	Desktop	- A <u>c</u> count	✓ Policy ✓ Search hange (Pending) ← Person	▼ <u>T</u> eam <u>A</u> d nal Auto Indiana E	Iministration	 ▼ Testing ▼ 122 Sabrina Salt Ac 	: 🖉 🖗 🛛
Verify all lienholder and/or lease	Policy Change 10519000 Pending	Lienho	older/Addition	al Interest	< Back	Next> Quote	Withdraw Transaction
information is correct for the added vehicle(s)	Policy Contract	1	Private Passenger	2014	CHEV	CAMARO SS	2G1FS1EW6E921303
	Policy Info	2	Private Passenger	2014	HYUN	SANTA FE G	KM8SN4HF0EU0463
		3	Private Passenger	2013	AUDI	A5 2.0 QU	WAURFAFRXDA0075
	Drivers	4	Private Passenger	2012	VOLK	CC LUX	WWWHN7ANXCE501
	Accidents/Violations	6	Private Passenger	2012	FORD	F-350 SUP	1ERSS3BI 1CDB2046
Select Policy Review on the left	Vehicles Usage-Based Insurance	Additional In	iterest				
	Coverages	Personal Vehi	cle Additional Interests				
	Lienholder/Additional Interest	Add 💌	Remove				
		, Name ¢	Type Expiration Date :	Certificate Requi	red 🗘 🛛 Loan Nu	umber 🌻	
	Policy Review Quote Forms	J	No dat	a to display			

Step 12	
Action	Screen
On the Policy Review screen:	👖 Desistop • Agcount • Policy • Search • Ieam Administration • Testing • 🕴 🖉 🕲 G
Review the changes and verify all values	Actions IP College Ferring College Ferring <t< td=""></t<>
Select Quote	Comparing Existing Policy and Policy Changes 1853900 Policy Info Them Them
	Accidente Woldstore Velicy Info Accidente Woldstore Velice Initial Conditions Created No Ves
	Usage-based focurance I Is Online Account Registered Yes Has EDA Content Yes Konsent Yes Vehicles Vehicles
	Underwiting V 2011 HOND PILOT EX V Underwiting I Covrages
	Collision Collision Comprehensive V Collision Comprehensive V Medical Payments V
	i i ropetyvendge v

Step 13

Premium information displays on the Quote screen with the newly-merged vehicles present in the Vehicle Level section at the bottom.

Review the premium information on the top right.

- Select Issue Change
- Select **Ok** on the Issue Change pop-up window







Step 14

Action	Screen
The Policy Change Bound screen indicates the change was successful.	Desktop • Account • Bolicy • Search • Ieam Administration • Testing • :
Select the Account link in the toolbar	Policy Change Bound Vour Policy Change (#10519000) has been bound. • (New your policy (#9113.1 9000255)
	Documents Review Changes Go to your desktop

Step 15

Action

The combined policy now shows all vehicles. In this example, four original vehicles plus the two merged vehicles from the Split Vehicle policy.

The other policy still exists and now must be cancelled so that the client will not be doublebilled and coverage will not be duplicated.

• Select the **Policy link** for the In Force (current term) policy to be cancelled

Note: Do not select an expired or cancelled term.

Actions ID Solution So	
I Summary Account File Summary Refresh Change Account Holder To -	
Contacts Account No 9859315392	
Delicy Transactions Account Name Sabrina Salt	
La Submission Manager Status Active	
Address 2319 FOUR SEASONS FAW1 Dunderwriting Files CROWN POINT, IN 46307-9342	
Country United States of America SSN *******************************	
<u>History</u> Current Activities	
Created Date 💠 Due Date 💠 Priority 💠 Subject 🜩	Assigned To
04/26/2022 04/29/2022 Normal (C_ACT_2) Electronic Signature envelope was not automatically issued	Training Agent
: 04/26/2022 04/29/2022 Normal (C_ACT_2) Electronic Signature envelope was not automatically issued	Training Agent
Policy Terms	
Policy # Product Risk Business Type Status Effective D	ate Expiration Date
2013 AUDI A5 2.0 QU	
2012 VOLK CC LUX	
2014 CHEV CAMARO SS 9113J 900025 Personal Auto New Business In Force 04/26/2022	10/26/2022
2014 HYUN SANTA FE G	
2011 HOND PILOT EX	
2012 FORD E-350 SUP	
2011 HOND PILOT EX 9113J 900026 Personal Auto New Business In Force 04/26/2022	10/26/2022
9113J 900026 Personal Auto New Business In Force 04/26/2022 2012 FORD E-350 SUP	10/26/2022

Screen

Step 16

On the Summary screen: • Select Actions • Select Cancel Policy from the dropdown list • Select Cancel Policy from the dropdown list • Video from the dropdown list • Select Cancel Policy from the dropdown list • Select Policy from the dropdown list • Sele	Action	Screen	
 Select Actions Select Cancel Policy from the dropdown list Select Cancel Policy from the dropdown list Weidy Info But Select Cancel Policy from the dropdown list Select Cancel Policy from the dropdown	On the Summary screen:	■ Desktop • Account • Bolicy • Search • Team Administration • Testing • : Ø @	
 Select Cancel Policy from the dropdown list Accdert/vlotors. Vehicles Usage Based Insurance Owengs Liebebder//dditionst Quote Gree Policy from the Ore policy Spin-off Policy S	Select Actions	Actions E \$6 to Initiality Safety and Safety Account: 165551,5352 Policy Contract Policy Contract Account File Policy Contract Policy Contract	
Summary Policy Address 279 FOUR SEASONS PRWY CROWN POINT, IN 45307-9342 Dilling Status County PORTER Producer of Record	 Select Cancel Policy from the dropdown list 	Policy Info Drivers Accodents/Violations Pre-Reneval Direction Spin-off Policy from this One Covarges Lenholder/Additional Quode Forms Date D (Quode Forms Date D (Quode Covarge C	



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Step 17

Action

On the Start Cancellation for Policy XXXX screen:

- Complete all required fields, including: •
 - o Select Insured from the Source dropdown
 - Select Transfer from the Reason dropdown
 - o Enter Split Vehicle Merge in the **Reason Description field**
 - o The Cancellation Effective Date must match the effective of the change on the policy to which you are moving the vehicles
 - o Select the option for any return premium created by the merge
- Select Start Cancellation •

Screen Desktop | • Account | • Policy | • Search | • Team Administration | • Testing | • : 000 📄 Policy File 🚓 Personal Auto Indiana Sabrina Salt Account: 9859315392 Policy: 9113J 900026 In Force (Exp. 10/2 Start Cancellation For Policy #9113J 900026 Start Cancellation Car Policy Contract Policy Info Source * Insured Drivers * Transfer Pason Reason Description 5th vehicle merge Accidents/Violati • Vehicles Refund Method Pro rata ancellation Effective Date * 04/26/2022 団 Coverages * Transfer Credi Lienholder/Additional. would you like to transfer the money to the new policy or refund? Ouote • Forms

Step 18 Action Screen On the Confirmation screen: Desktop | • Account | • Policy | • Search | • Team Administration | • Testing | • ú : 7 0 0 🗙 Cancellation (Quoted) 🚓 Personal Auto Indiana Effective: 04/26/2022 Sabrina Salt Account # 9859315392 Policy Select Cancel Now from the Cancel Confirmation Seck Edit Cancel Options Options dropdown To finalize your cancellation, please select a Cancel Opt. Schedule Cancellation <u>C</u>ancel Now 9113J 900026 Policy Period Policy Number Entry 04/26 Select Ok on the Cancel Policy pop-up Primary Named Insured Sabrina Salt Previous Policy Full Term Premium \$1,418 2379 FOUR SEASONS PKWY CROWN POINT, IN 46307-9342 window Policy Address X Tools PORTER County Note Underwriting Company Depositors Insurance Company Available Coverages Residual Market RM 15 Documents Summary Premium Details Cost Change Details Participants Applied Discounts/Surcharges Policy Level Discounts/Surcharges Description \$ Advance Ouote Discount





Step 19	
Action	Screen
 The <i>Cancellation Bound</i> screen indicates that the cancellation was successful. Select the Account link in the tool bar 	U Desktop Account Policy Search Ieam Administration Testing Image: Cancellation (Bound) Personal Auto Indiana Effective: 04/26/2022 Sabrina Satt Account: 9859315392 Cancellation Bound View your policy (#1133 900026) Occuments Go to your desktop
Step 20	
Action	Screen
On the Account File Summary screen, under Policy Terms, the policy from which the vehicles were moved now shows as cancelled.	



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