

How to Use Reference Connect (Personal Lines)

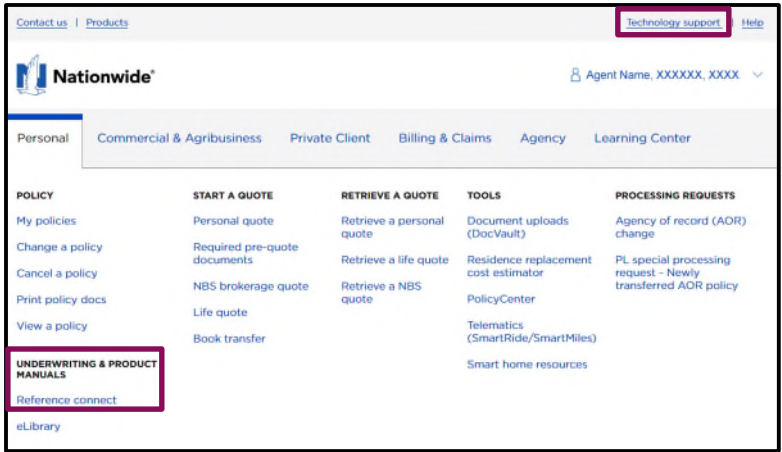


Description

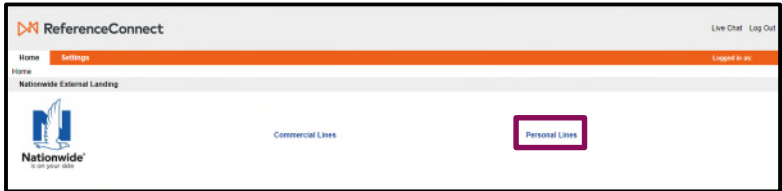
This job aid will show you how to use Reference Connect to search for, locate, and view Personal Lines forms and manuals. Reference Connect is your resource to quickly locate manuals and forms. Manuals include underwriting guidelines and state specific payment options. Standardized policy contracts and endorsements are located under Forms.

Access Reference Connect

Step 1

Action	Screen
<p>You can access Reference Connect from the Agent Center Workspace. Select the “Personal” tab, “Underwriting & Product Manuals” section.</p> <p>Note: If you receive a login screen indicating “Access denied”, select the “Technology support” link at the top, right of Agent Center Workspace for help. You may need to partner with your Agency Admin to ensure your permissions are set up in Agent Center correctly.</p>	

Step 2

Action	Screen
<p>After selecting Reference Connect, you will typically be taken to the Landing Page.</p> <p>Note: If you already have Reference Connect open, you may be directed to the Home Page instead of the Landing Page.</p> <p>From the Landing Page, select “Personal Lines”.</p>	

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Access Reference Connect (cont'd)

Step 3

Action	Screen
<p>The Personal Lines Home Page displays.</p> <ol style="list-style-type: none"> At any time, you can return to the Landing Page to change the product line simply by selecting Landing Page in the upper left corner. The Home Page includes a section of resources and links. Pay special attention to the Open and Closed Companies links under "Frequently Used Documents". These are especially helpful as they provide charts which identify the open and closed companies in each state. Note the contact information for any questions. 	

Search by Effective Date

Step 1

Action	Screen
<p>There are several search methods in Reference Connect. The "Search by Effective Date:" defaults on the landing page.</p> <p>For example, let's search for Indiana's homeowners policy written in the Nationwide Mutual Insurance Company.</p> <p>There are five filters to help refine your search.</p> <ol style="list-style-type: none"> To determine whether to search by "Manuals" or "Forms": <ul style="list-style-type: none"> "Manuals" have company guidelines and state specific information. "Forms" have policy/contract details. Since we're searching for a policy, select "Forms". "Company" – the policy we're searching for is in the Nationwide Mutual Insurance Company. Select that company in the dropdown listing. "State" – select the state. In this case it's Indiana. "LOB (Line of Business)" – select the appropriate line of business, which is "Homeowner". "Effective" date – will default to the current date. You can change the date by selecting the calendar icon. <p>Once all information is entered, select the "Go!" button.</p>	

Search by Effective Date (cont'd)

Step 2

Action

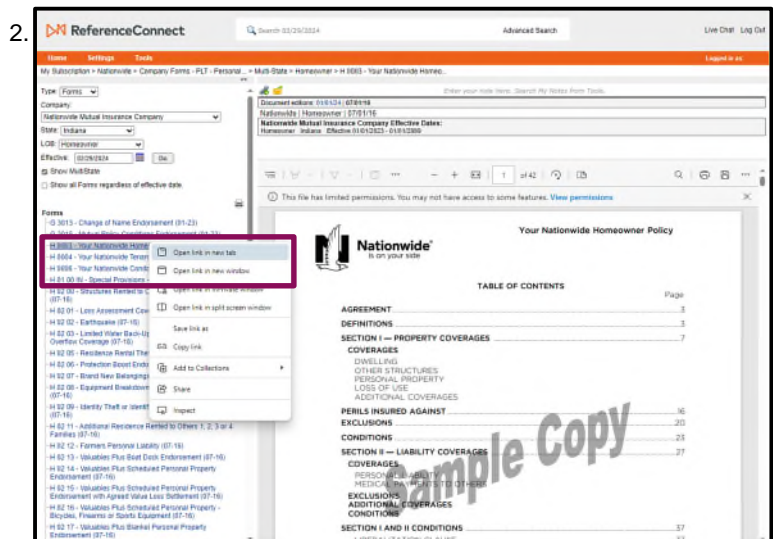
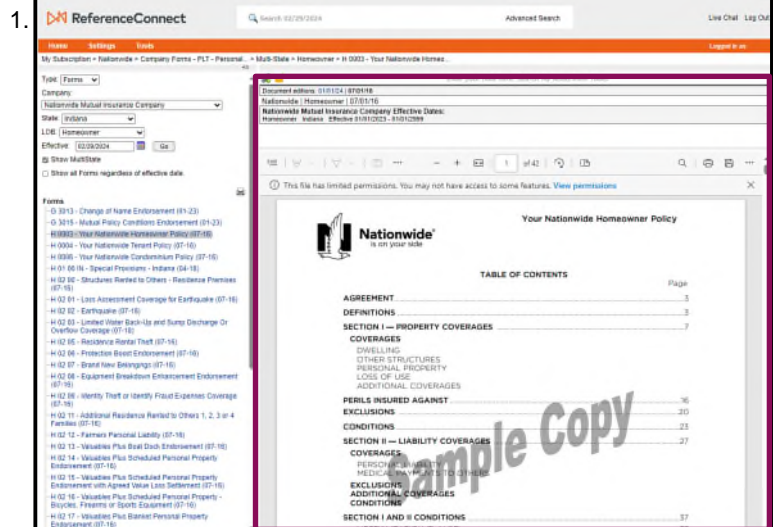
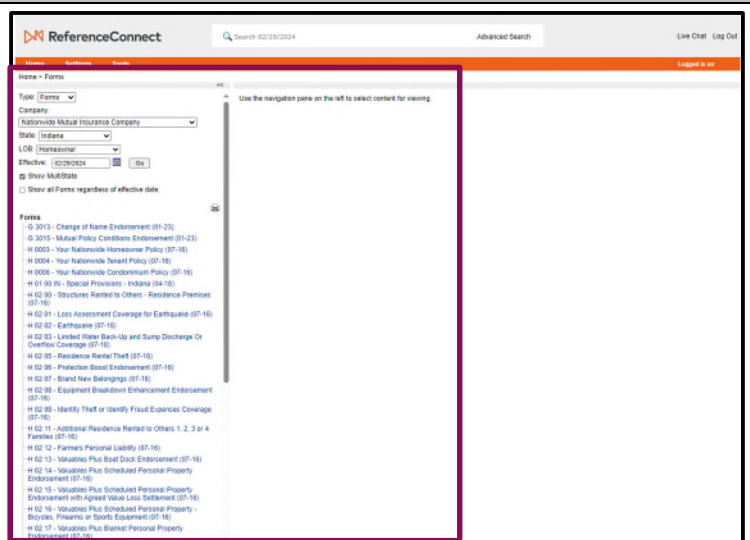
All the documents that meet your search criteria are displayed. From the list, locate the Homeowners Policy.

Note: If you have a question specific to Nationwide's Homeowner Policy, you would want to select "Manuals", instead of "Forms", to look at the underwriting guidelines.

There are a couple of ways you can view "Your Nationwide Homeowner Policy" form.

1. Select the form in the results panel and it will appear in the current window to the right of the list. Please be aware that if you navigate away from this window or conduct another search, the document will not be retained, and you will need to search again to view it.
2. The other option is to open the document in a new browser tab or window. To do this, simply right-click on the highlighted form and select the option to open in a new tab or window. The exact wording of these options may vary depending on the browser you are using, but most browsers have one or both options.

Screen



Find Contract Form Numbers and Documents in PolicyCenter

Step 1

Action

A simple way to see contract form numbers for a policy is to select PolicyCenter's "Forms" tab.

Screen

The screenshot shows the PolicyCenter Summary page. The left sidebar has a 'Forms' tab highlighted with a red box. The main content area shows account information and associated policy transactions.

Account Information		Associated Policy Transaction	
Account Number	XXXXXXXXXX	Created	01/29/2024
Account Name	Account	Closed	01/29/2024
Policy		Type	Policy Change
Product	Personal Auto	Period	
Number		Effective Date	09/06/2023
Original Effective Date	09/06/2022	Expiration Date	01/06/2024
Annual Anniversary Date	09/06/2024	Number of Terms	23

Step 2

Action

Every contract form that is on the policy displays.

For example, if you want to search the contract language for the policy's "Vanishing Deductible" coverage, note the "Form #" and "Edition Date".

With this information, proceed to the next search type in Reference Connect, "Search by Form Number or Key Words"

OR

You can look for the document in PolicyCenter's "Documents" tab by following Step 3 below.

Screen

The screenshot shows the PolicyCenter Forms page. A table lists various forms with columns for Form #, Edition, Edition Date, Description, Bureau Form #, In Force, and Effective Date. The row for 'A-4570' with 'Vanishing Deductible' is highlighted with a red box.

Form #	Edition	Edition Date	Description	Bureau Form #	In Force	Effective Date
A-3953 PM	07-23	07/23/2023	Automobile Insurance Work Rating/Plan Information - Pennsylvania (BACDA)		Yes	09/06/2023
A-4580	07-10	07/10/2023	Your Nationwide Auto Policy		Yes	09/06/2023
A-4580	07-10	07/10/2023	Auto Declarations		Yes	01/29/2024
A-4580	07-10	07/10/2023	Auto Declarations		Yes	01/29/2024
A-4570	07-10	07/10/2023	Vanishing Deductible		No	01/29/2024
A-4570	07-10	07/10/2023	Liability Research		Yes	09/06/2023
A-4627	07-18	07/18/2023	First Party Benefits Coverage - Pennsylvania		No	01/29/2024
A-4627	07-18	07/18/2023	First Party Benefits Coverage - Pennsylvania		Yes	09/06/2023
A-4627	07-18	07/18/2023	First Party Benefits Coverage - Pennsylvania		No	01/29/2024
A-4627	07-18	07/18/2023	First Party Benefits Coverage - Pennsylvania		No	01/29/2024
A-4628	07-18	07/18/2023	Limited Tort Alternative Information Notice - Pennsylvania		Yes	09/06/2023
A-5057	07-18	07/18/2023	Special Provisions - Pennsylvania		Yes	09/06/2023
A-5059	07-18	07/18/2023	Uninsured Motorists Coverage (Stacked) - Pennsylvania		No	01/29/2024

Step 3

Action

Some policy documents are available under the "Documents" tab in PolicyCenter.

- Select "Policy Documents (Date Range)".
- Select a date range, if needed.
- Select the "Search" button.
- Documents such as policy declarations, billing notices and additional documents display.
- Select the "View/Print" button on the specific document(s) you want to view and/or print.

Note: Not all documents will display here. You can search for any form in Reference Connect as demonstrated in this job aid.

Screen

The screenshot shows the PolicyCenter Documents page. It has tabs for 'Online Documents', 'Policy Documents (Date Range)', 'Policy Documents (As of Date)', and 'Renewal Print'. The 'Policy Documents (Date Range)' tab is selected. A date range is entered from 01/01/2023 to 01/01/2024. A search button is highlighted with a red box. Below, a table lists documents with columns for Name, Description, Form #, Edition Date, Actions, Transaction Type, Print Date, and Transaction Time. The 'View/Print' button for the first document is highlighted with a red box.

Name	Description	Form #	Edition Date	Actions	Transaction Type	Print Date	Transaction Time
ID Card(s)	AUTO DEC AND BILL			View/Print	Renewal	02/13/2024	14:42:47
ID Card(s)	AUTO DEC AND BILL			View/Print	Amendment	01/13/2024	16:01:06
ID Card(s)	AUTO DEC AND BILL			View/Print	Renewal	08/04/2023	05:17:21
ID Card(s)	AUTO DEC AND BILL			View/Print	Amendment	04/05/2023	15:39:47
ID Card(s)	AUTO DEC AND BILL			View/Print	Renewal	02/01/2023	09:55:53

Search by Form Number or Key Words

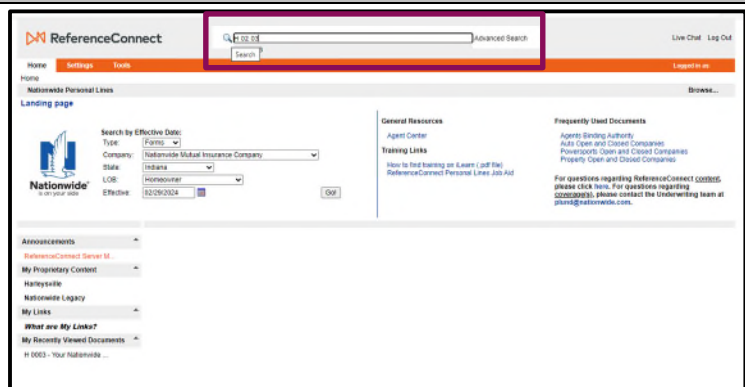
Step 1

Action

You can also search for a specific form number or keywords.

Simply enter your search criteria in the “Advanced Search” field at the top of the page and select the magnifying glass or press the “Enter” key.

Screen



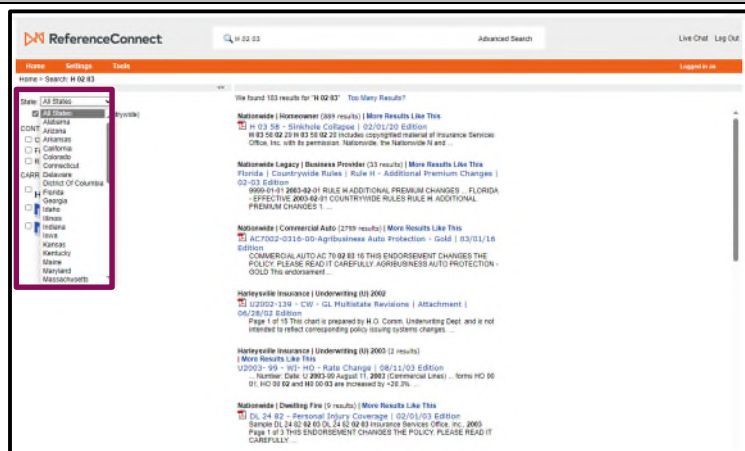
Step 2

Action

The search results display. You may narrow your search results using the options in the left-hand panel.

You can open your desired document the same way as before.

Screen



Search Using Browse

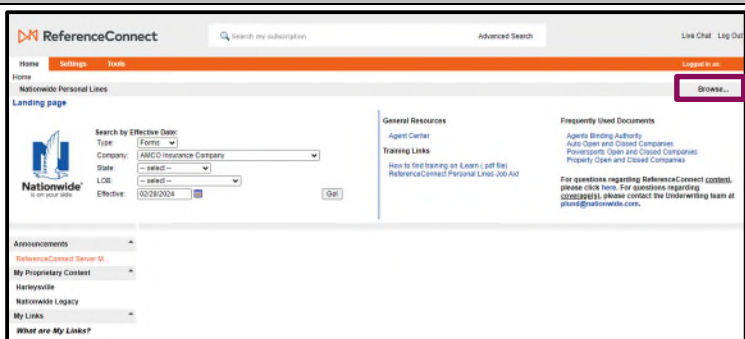
Step 1

Action

The third search method in Reference Connect is to utilize the browse option.

Select “Browse...” from the Home Page.

Screen




Search Using Browse (cont'd)

Step 2

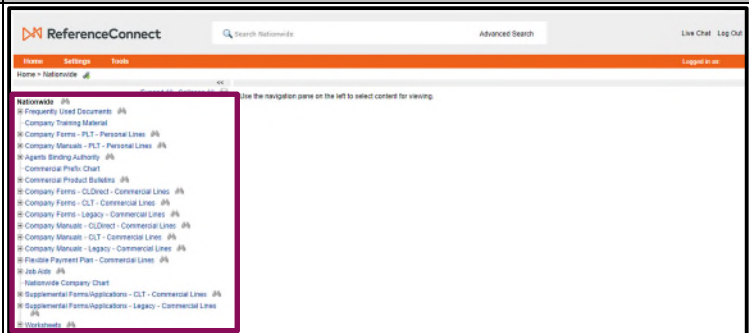
Action

The list of available forms and manuals will be loaded in the left panel of your screen.

To access a document, simply select each item or the + signs to open your options, allowing you to drill down to the desired information.

Note: Selecting the binoculars icon  will do the same thing.

Screen

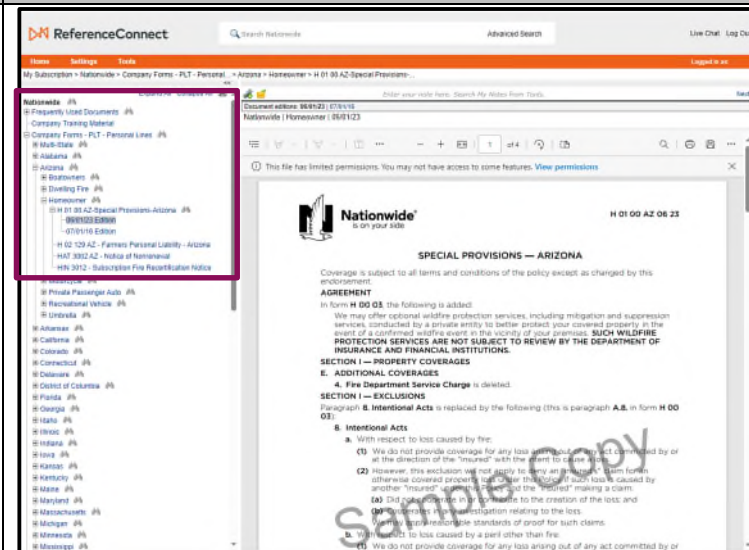


Step 3

Action

For example, to view the Arizona Homeowners Special Provisions, select and drill-down on the list until you locate it.

Screen



Access Recently Viewed Documents

Action

If you need to access any recently viewed documents, there is no need to perform the search again. Look under "My Recently Viewed Documents" on the Landing page and select the previously viewed document you need.

Screen

