# PolicyCenter Quick Start Guide for Agents

## Description:

This job aid provides high-level information about the Personal Lines PolicyCenter system, including How you will launch to PolicyCenter from Agent Center and Comparative Raters. Additionally, it includes a list of general questions and answers about PolicyCenter. The document also provides options for further training and support.

## Table of Contents

## PolicyCenter New Business Process Flow:

The process flow below provides the high-level steps needed to create a policy in PolicyCenter.

| Start | Launch | Complete | Issue |
|---|---|---|---|
| Start in Agent Center or Comparative Rater | Launch to PolicyCenter from starting system | Complete all screens and required information in the quote | Set Up Billing Account |
| | Locate Account and/or quote | Request Underwriting approval, if required | Issue Policy |

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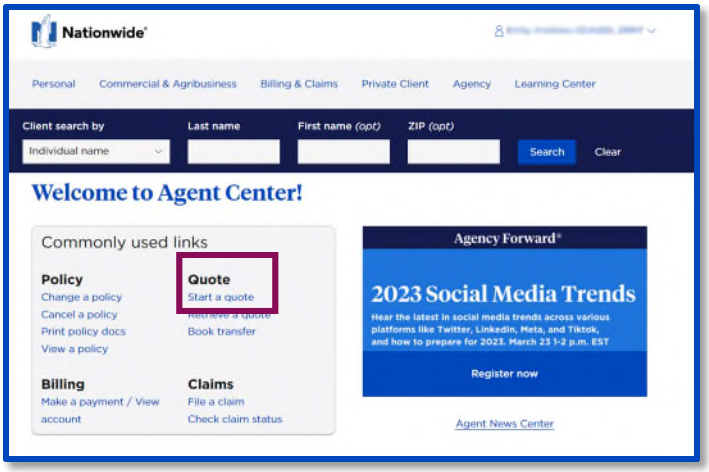
## Launching from Agent Center:

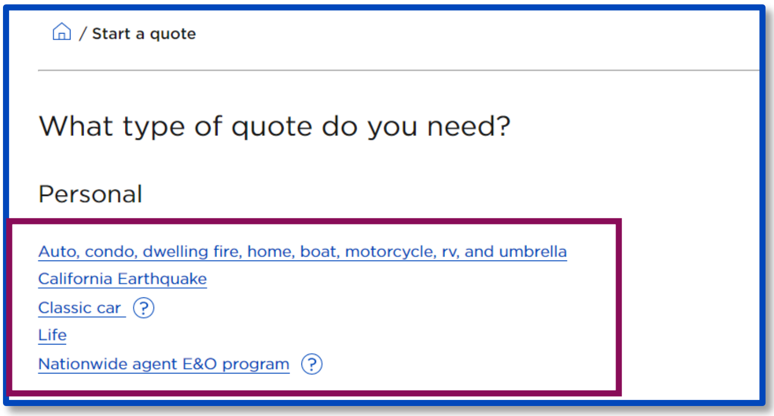
This section provides the steps to link you from Agent Center to PolicyCenter when working with a potential new member. For additional information, refer to the PolicyCenter – Agent Center Cross-Reference Guide.

### Step 1

| Action | Screen |
|---|---|
| To ensure the policy is written on the correct company and in the correct system, start on the Agent Center Home screen.<br><br>• ***Select*** the **Start a Quote** link in the Quote section in Commonly used links. |  |

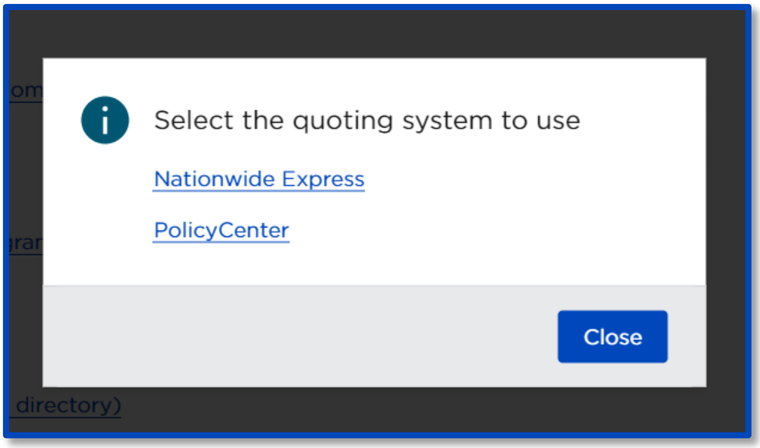


### Step 2

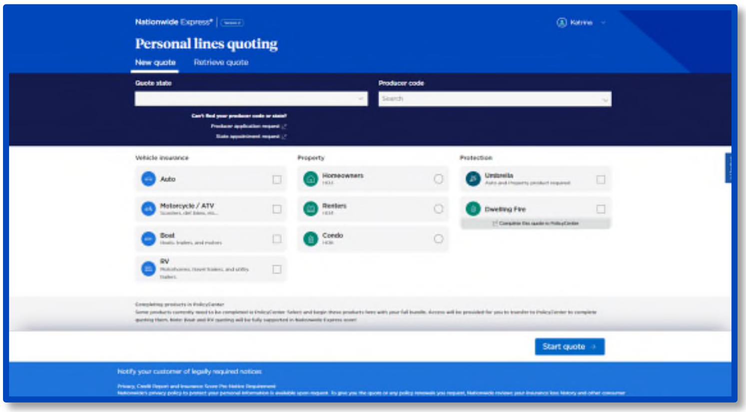
| Action | Screen |
|---|---|
| On the **Start a Quote** screen:<br><br>• ***Select*** the type of quote needed. |  |

# PolicyCenter Quick Start Guide for Agents

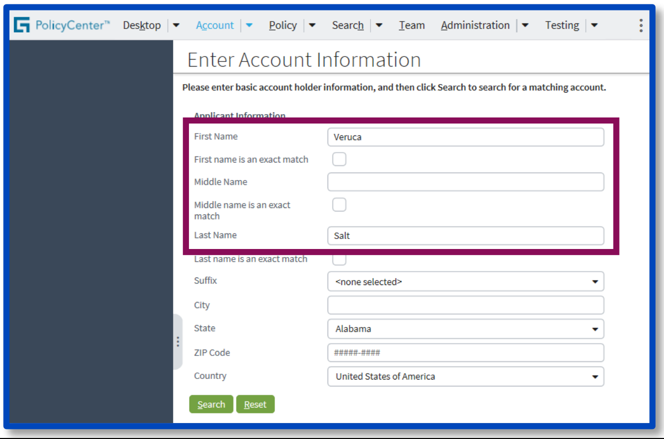
## Step 3

| Action | Screen |
|---|---|
| ***Select*** the quoting system to use.<br><br>Consider starting all quotes for new customers in Nationwide Express. Beginning in Nationwide Express will create an account in PolicyCenter, and all customer data will migrate to PolicyCenter. |   |

## Step 4

| Action | Screen |
|---|---|
| ***Select*** your Quote state and Producer code from the drop-down options. Select the products to be included in the quote and Start Quote to begin entering customer information. |   |

## Step 5

| Action | Screen |
|---|---|
| On the *Enter Account Information* screen:<br><br>Enter the member's **First Name** and **Last Name** in the appropriate fields.<br><br>***Select*** the **<u>S</u>earch** button. |   |

## Step 6

### Action

On the *Enter Account Information* screen in PolicyCenter:

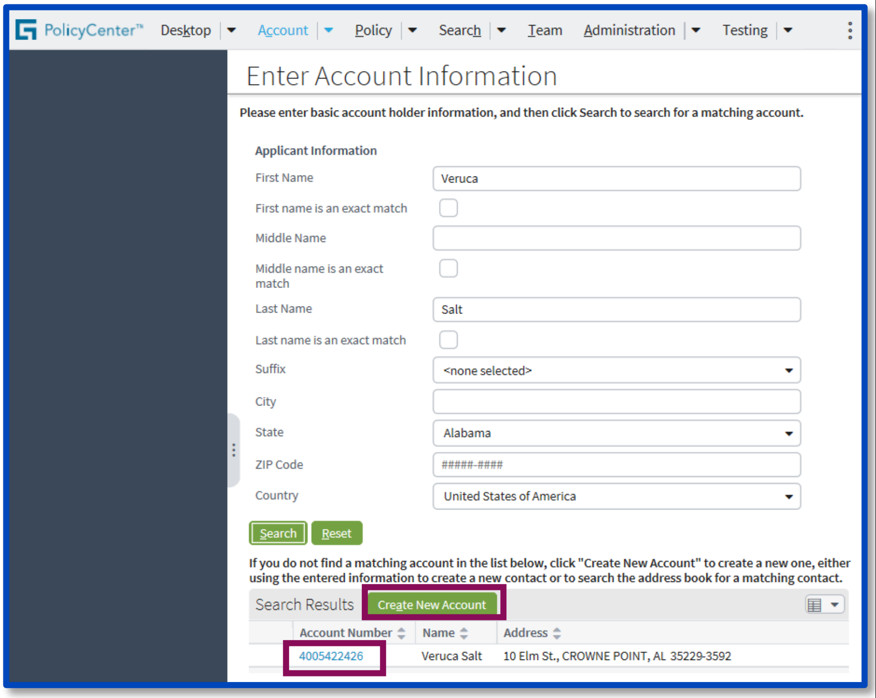
If a PolicyCenter account does not exist:

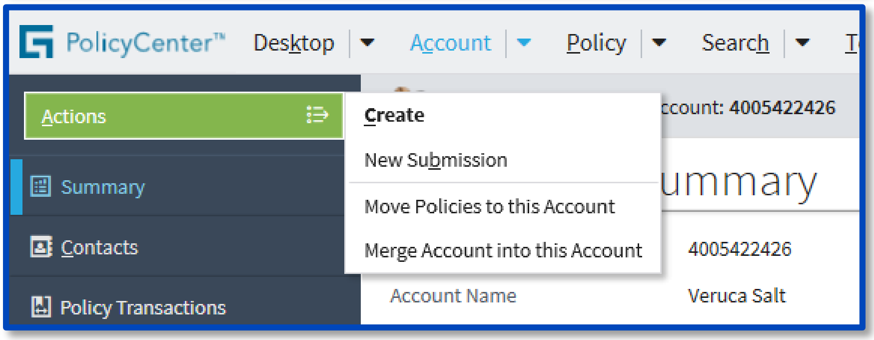
- ***Select*** the **Create New Account** button and complete the client information in PolicyCenter to create an account.
- After creating the account, start a new quote from the *Account Summary* screen.

If a PolicyCenter account exists:

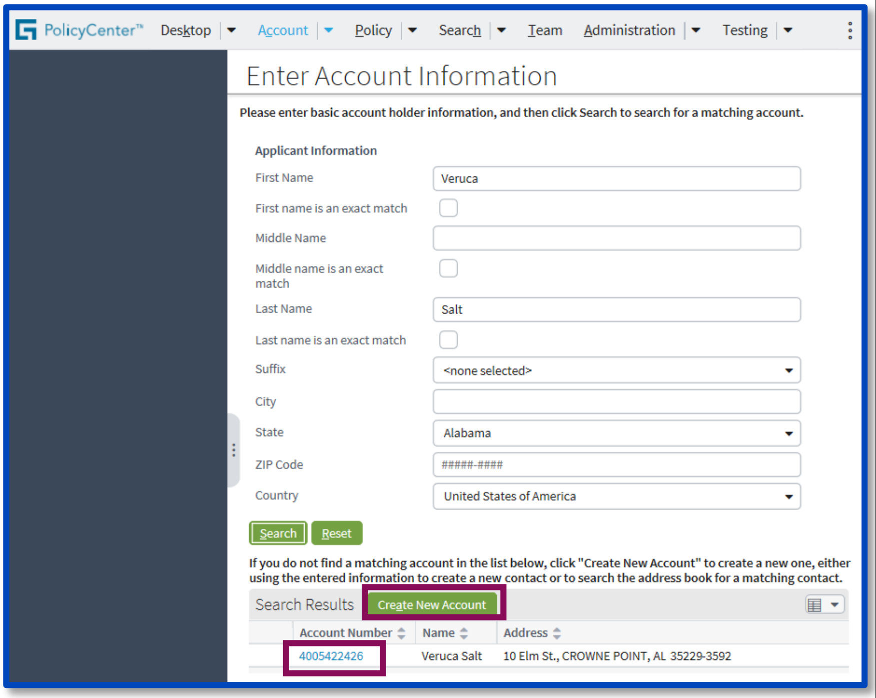
- ***Select*** the account link in the *Search Results* section and start a new quote from the *Account Summary* screen.
- ***Select*** the **Actions** button and select **New Submission**.

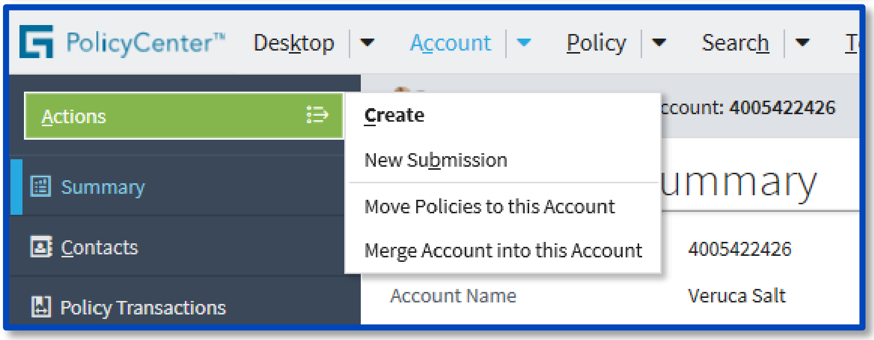
### Screen



## Step 6

<table>
<tr><th>Action</th><th>Screen</th></tr>
<tr><td>
On the Enter Account Information screen in PolicyCenter:<br><br>
If a PolicyCenter account does not exist:
<ul>
<li>Select the Create New Account button and complete the client information in PolicyCenter to create an account.</li>
<li>After creating the account, start a new quote from the Account Summary screen.</li>
</ul>
If a PolicyCenter account exists:
<ul>
<li>Select the account link in the Search Results section and start a new quote from the Account Summary screen.</li>
<li>Select the Actions button and select New Submission.</li>
</ul>
</td><td>




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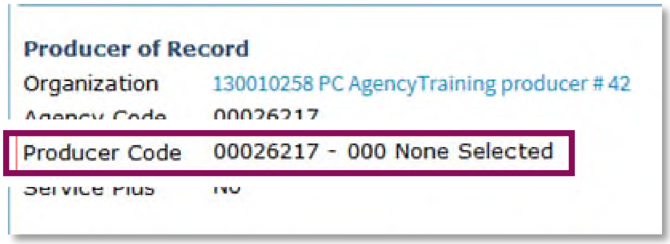
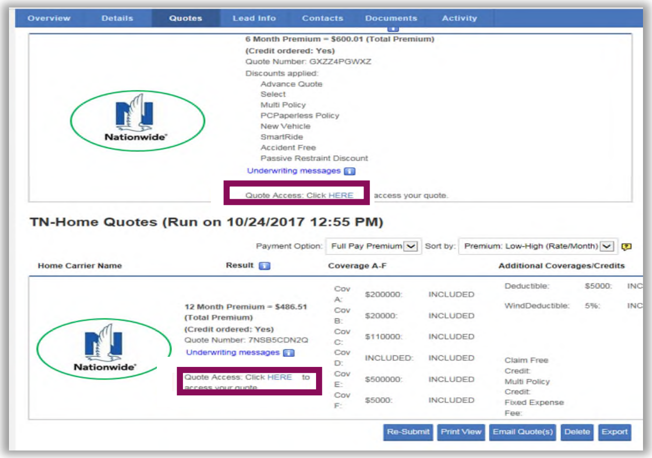
## Launching from a Comparative Rater:

This section describes the process to launch from a Comparative Rater to PolicyCenter. The chart below describes where you will land in PolicyCenter, depending on the Comparative Rater used and type of policy.

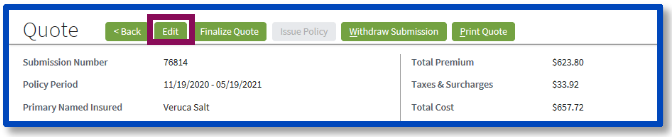
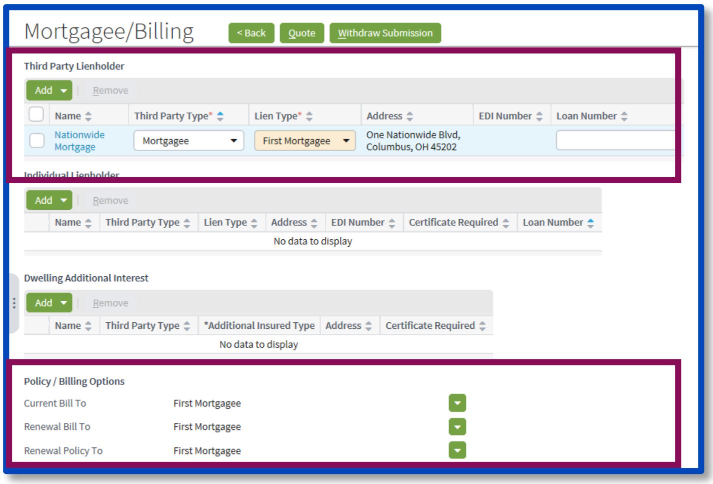
| Rater | Auto | Property | Note |
|---|---|---|---|
| **EZLynx*** <br> • Quote Access **Select HERE** link | Deep launch to PolicyCenter *Policy Info* screen | Deep launch to PolicyCenter *Qualification* screen | Agent must log in to PolicyCenter with NW credentials. |
| **EZLynx*** <br> • Using NW logo | Launches to Agent Center | Launches to Agent Center | Agent must log in to Agent Center with NW credentials, enter quote information in Agent Center, then search for quote in PolicyCenter. |
| **PLR** | Deep launch to PolicyCenter *Policy Info* screen | Deep launch to PolicyCenter *Qualification* screen | DO NOT have to login to Agent Center. |
| **ITC** | Deep launch to PolicyCenter *Policy Info* screen | Deep launch to PolicyCenter *Qualification* screen | Agent must log in to PolicyCenter with NW credentials. |
| **Applied** | Deep launch to PolicyCenter *Policy Info* screen | Deep launch to PolicyCenter *Qualification* screen | DO NOT have to login to Agent Center. |
| **IBQ** | Deep launch to PolicyCenter *Policy Info* screen | Deep launch to PolicyCenter *Qualification* screen | Agent must log in to Agent Center with NW credentials. |

## Additional Comp Rater Information:

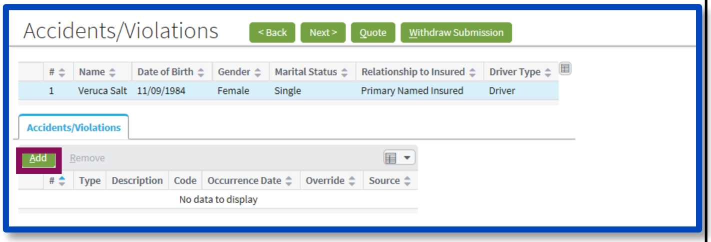
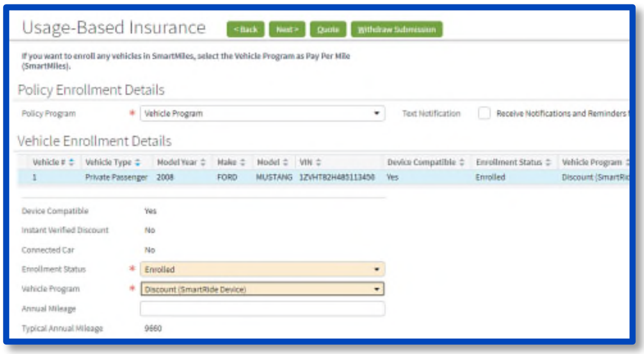
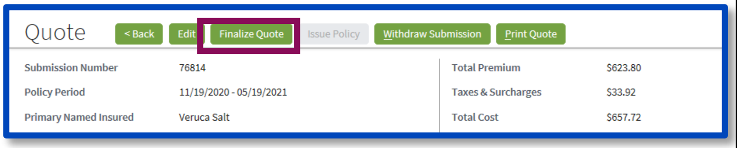
| Producer Code Confirmation | Additional EZLynx Information |
|---|---|
| It may be necessary to confirm the Producer Code when launching in to PolicyCenter. The following system message displays if the Producer Code three-digit suffix is 000: *“Producer Code should be reviewed to guarantee correct assignment of new business.”*<br><br>To confirm the correct Producer Code is assigned to the policy, review the Producer Code assigned in the *Producer of Record* section. The correct Producer Code can be selected from the drop-down menu, if the Agent is licensed and appointed in the selected rate state.<br><br> | To deep launch into PolicyCenter from the EZLynx Comparative Rater, select the link(s) outlined in red in the image below.<br><br>If the Nationwide logo is selected from the EZLynx Comparative Rater (outlined in green in the image below), you will be launched into Agent Center. You will be required to go through the quote process in Agent Center before you are launched to PolicyCenter.<br><br> |

## Frequently Asked Questions:

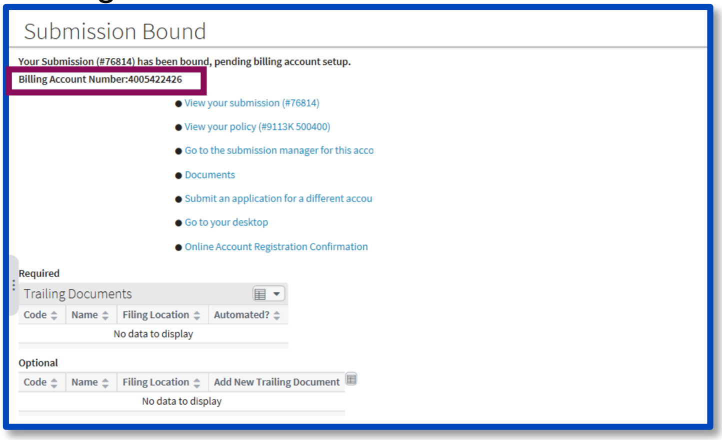
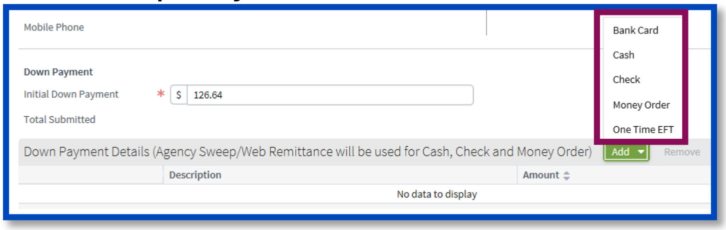
Below is a list of frequently-asked questions and answers about PolicyCenter.

| Question | Answer |
|---|---|
| Is it possible to edit a new submission (quote) before it is bound? | • Yes. After quoting you must edit a submission to make any additional changes. From any screen, Select the Edit button to begin the editing process.<br><br><br>• Refer to the Edit a Submission/Policy Transaction job aid for additional information. |
| Where do I add mortgage information on a Property policy? | • Mortgage information is added on the Mortgagee/Billing screen.<br>• Mortgage information is added in the Third-Party Lienholder section.<br>• Updates to Billing Options are made in the Policy/Billing Options section.<br><br><br>Note: Refer to the Add Mortgagee (Third Party) job aid for the full steps to add a Mortgage to a policy. |

## Frequently Asked Questions (continued):

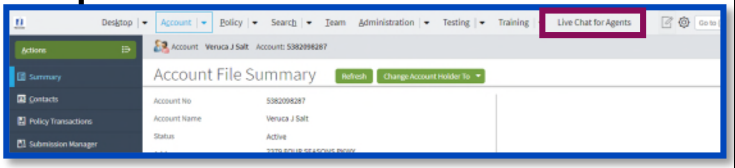
| Question | Answer |
|---|---|
| How do I add Accidents or Violations to an Auto policy? | • Accidents and Violations are added on the *Accidents/Violations* screen of an Auto policy.<br>• Select the **Add** button to create a new item.<br><br> |
| Where do I select Smart Ride? | • Smart Ride is added on the Usage-Based Insurance screen on an Auto policy.<br><br><br>• Refer to the How to enter Usage-Based Insurance Information job aid for additional information. |
| When is the MVR ordered in PolicyCenter? | • MVR is ordered after the submission is quoted, but before the policy is issued, by selecting the Finalize Quote button.<br>• The Finalize Quote button does not activate until the submission has been quoted.<br><br> |

## Frequently Asked Questions (continued):

| Question | Answer |
|---|---|
| How do I find Billing Account information? | • The Billing Account number displays on the Submission Bound screen on a new policy during the bind process.<br>• For an existing Billing Account, account information can be viewed in Agent Center.<br> |
| How do I apply multi-source payments to a down payment? | • For the down payment of a new submission, the payment may be from multiple sources, such as: Bank Card, Cash, Check, Money Order, or One Time EFT. You may have up to four sources for the payment. Select the type of payment and amount for your account for the entire down payment.<br>• Refer to the Multi Source Payments job aid for step-by-step instructions for applying multiple sources of payment on a policy.<br> |

# PolicyCenter Quick Start Guide for Agents

## Training and Support:

| Question | Answer |
| --- | --- |
| Who can I contact for on-demand training help? | • Nationwide Virtual Assistant is available via the Personal Lines Support link in the tab bar of the PolicyCenter screen. Basic questions and answers are programmed into the Virtual Assistant.<br>• Training Connection is a Live Chat service with a Nationwide Service Center Trainer. The Training Connection is best utilized for help the Virtual Assistant cannot answer. You will be offered to connect with Training Connection after the Virtual Assistant fails to answer your question twice.<br>• Training Connection hours are **Monday – Friday 9:30 a.m. to 7:30 p.m. EST**<br> |
| Where can I find PolicyCenter training materials? | • Fugent – Self-paced PolicyCenter eLearning courses, job aids, and Learning Snacks are available on Fugent. Access a list of all available Personal Lines PolicyCenter eLearning courses here. |