

PA Customer Acknowledgement

PolicyCenter



Description:

This job aid discusses the Pennsylvania *Customer Acknowledgement* screen. The notices and documents on this screen are viewed, and shared with the customer, on the *Documents* screen. Currently, there are differences in the names of documents on the *Customer Acknowledgement* screen and *Documents* screen.

Background:

In the state of Pennsylvania, the *Customer Acknowledgement* screen displays pre-bind. Customers in Pennsylvania must be presented with the notices and documents displayed on the *Customer Acknowledgement* screen prior to binding any new business. On the *Documents* screen, view, save, and email all notice and/or documents to the customers. The eSignature process cannot be used pre-bind.

Step 1

Action	Screen
<p>The <i>Customer Acknowledgement</i> screen displays when you attempt to finalize the submission quote.</p> <p>Do not answer the two questions until you review the notices and documents with the customer.</p> <p>Click the Documents link.</p> <p>NOTE: At this point, do NOT click either of the buttons at the top of the screen.</p>	

Step 2

The *Documents* screen displays.

The names of the notices and/or documents are slightly different on the *Document* screen versus the *Customer Acknowledgement* screen. See the chart below to map the names.

Customer Acknowledgement Screen	Documents Screen
Important Notice First Party Coverage (Available Benefits & Limits)	PA Important Notice
Notice of Tort Options & Notice of Premium Discounts	Important Notice – Tort Options & Notice of Premium Discounts – Pennsylvania
Automobile Insurance Merit Rating Plan Information (Surcharge Disclosure Plan)	Automobile Insurance Merit Rating Plan Information – Pennsylvania
Minimum Package Invoice & Fraud Warning Notice	Minimum Package Invoice - Pennsylvania

Job Aid Process (Cont.) :

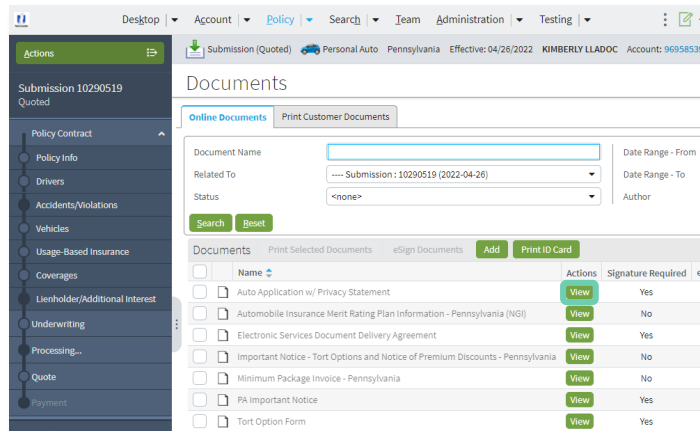
Step 3

Action

On the *Documents* screen:

- Click the **View** button to the right of each notice.
- Open and save the PDF to your desktop.
- Review with and/or email the documents to the customer.
- Repeat for each document until all notices and documents have been provided to the customer.

Screen



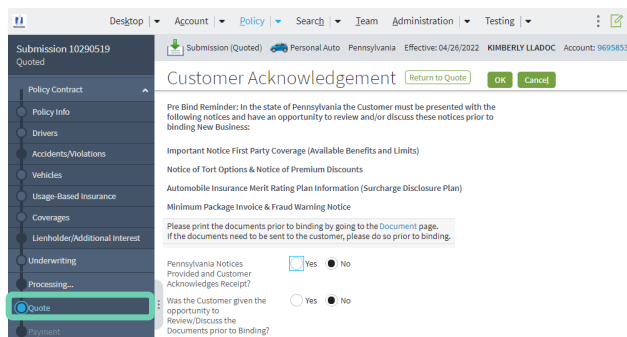
Step 4

Action

On the *Documents* screen:

- Click the **Quote** link.

Screen



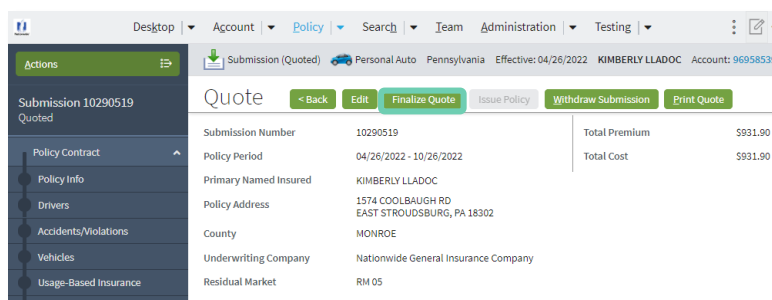
Step 5

Action

On the *Quote* screen:

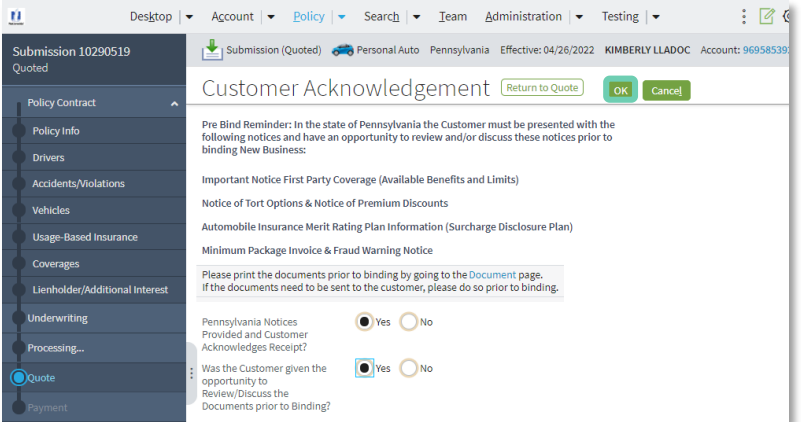
- Re-click the **Finalize Quote** button.
- Click **OK** in the pop-up confirmation window.

Screen



Job Aid Process (Cont.) :

Step 6

Action	Screen
<p>On the <i>Customer Acknowledgement</i> screen:</p> <ul style="list-style-type: none"> Update the answers to the questions. Click the OK button. Complete the remainder of the quote. <p>Note: After completing this process, if the MVR comes back adverse, you may need to resend the notices again to the customer, as the premium may change.</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.