

Editing Insured's Personal Information

Agent Center



Description

This job aid describes how to edit an insured's personal information in Agent Center.

Step 1

Action

After searching for the customer, the "Client Summary" screen will appear.

From the "Client Summary" screen:

- Select "Contact info".

Screen

The screenshot shows the Nationwide Agent Center interface. At the top, there are links for 'Contact us', 'Products', 'Technology support', and 'Help'. The Nationwide logo is on the left, and a user profile icon is on the right. Below the logo, there are tabs for 'Personal', 'Commercial & Agribusiness', 'Billing & Claims', 'Agency', and 'Learning Center'. A search bar is present with the text 'Client search by' and 'Policy number'. Below the search bar, there is a dropdown menu for 'Policy number' and a 'Search' button. The main content area shows the 'Client summary' page with a breadcrumb trail 'Home / Client summary'. At the bottom, there is a navigation bar with links for 'Jump to', 'Contact info' (highlighted with a red box), 'Policies', 'Billing accounts', 'Claims', and 'Contact history'.

Step 2

Action

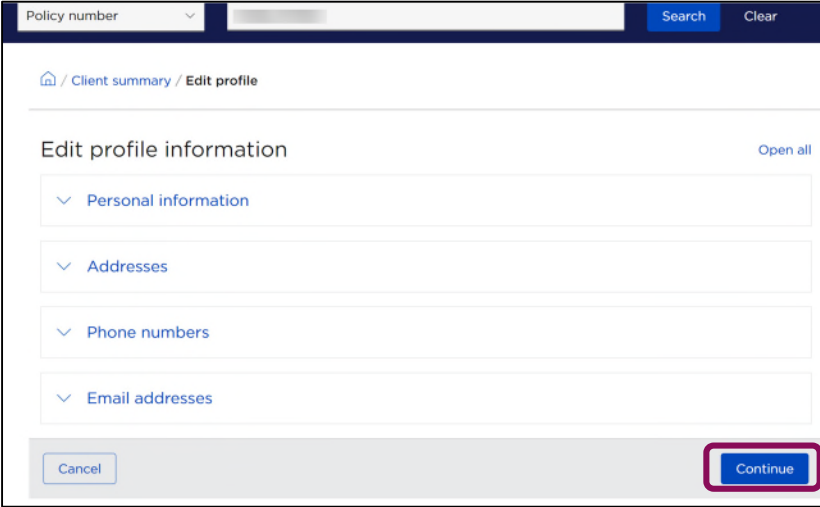
In the "Contact information" section:

- Select "Edit profile".

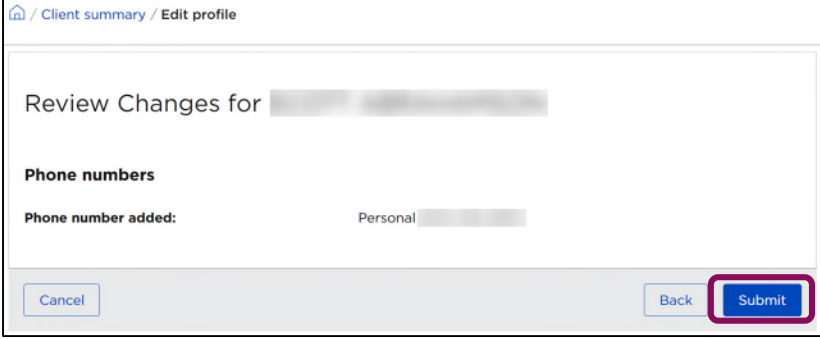
Screen

The screenshot shows the 'Contact information' section of the Nationwide Agent Center. It includes fields for 'Preferred address', 'Preferred email', and 'Preferred phone'. There is a 'Document delivery preference' section with a link to 'edit'. To the right, there is an 'Associated clients' section with a table for 'Name', 'Gender', and 'Birth date'. Below this, there is a '+ New Quote' button. The 'Active policies' section shows a list of policies, including an 'Auto' policy with details like 'Active 08/23/2023 - 02/23/2024', 'View policy', 'Change policy', 'Policy documents', and 'Document uploads'. It also shows 'Drivers [2]' and 'Vehicles [1]'.

Step 3

Action	Screen
<p>On the “Edit profile information” screen:</p> <ul style="list-style-type: none">• Select the appropriate tab to add or update.<ul style="list-style-type: none">○ Personal Information<ul style="list-style-type: none">▪ Legal names, preferred names, nicknames, etc.○ Addresses○ Phone Numbers○ Email Addresses• Select “Continue”.	

Step 4

Action	Screen
<p>Confirm that the changes you entered are correct and then select “Submit”.</p>	

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