

Rewrite an Existing Policy in PolicyCenter



Description

This job aid outlines the high-level process an Agent would follow to complete a rewrite of an existing policy in PolicyCenter.

Note: Rewrites may require prior Underwriting approval.

Step 1

Action

On the “Account File Summary” screen for the existing account:

- Select the “Actions” button.
- Select “New Submission” from the drop-down list.

Screen

Step 2

Action

On the “New Submissions” screen:

- Update the “Default Effective Date”, if needed. In this example, you will accept the default date.
- Select the radio button to the left of the appropriate Product. In this example, “Personal Auto” is selected.
- Choose the “Select” button.

Screen

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Step 3a

Action

On the “Policy Info” screen of the new policy:

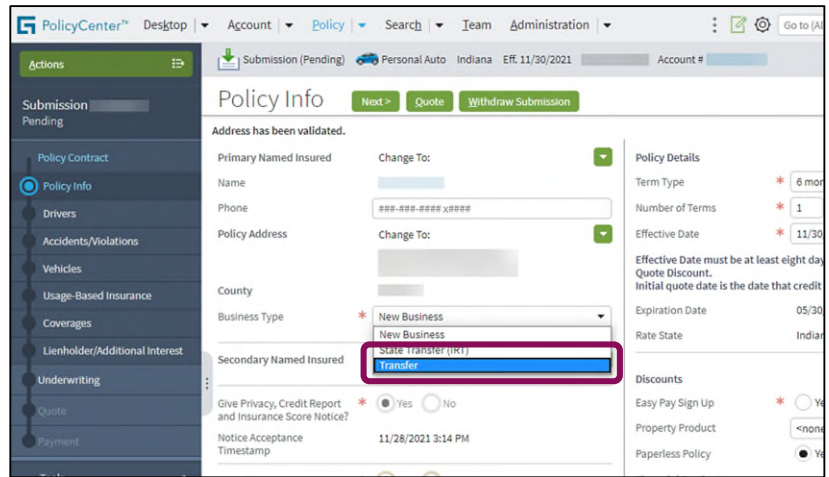
- Select “Transfer” from the “Business Type” drop-down list.

For a Property policy, continue to **Step 3b**.

For an Auto policy, continue to **Step 3c**.

For all other lines of business, continue to [Step 4](#).

Screen



Step 3b

Action

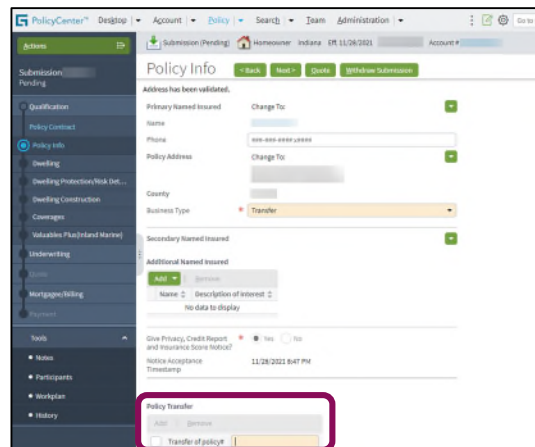
For Property only.

On the “Policy Info” screen:

- Select the “Add” button in the “Policy Transfer” section.
- In the “Transfer of policy #” field, enter the number of the transferred policy.

Continue to [Step 4](#).

Screen



Step 3c

Action

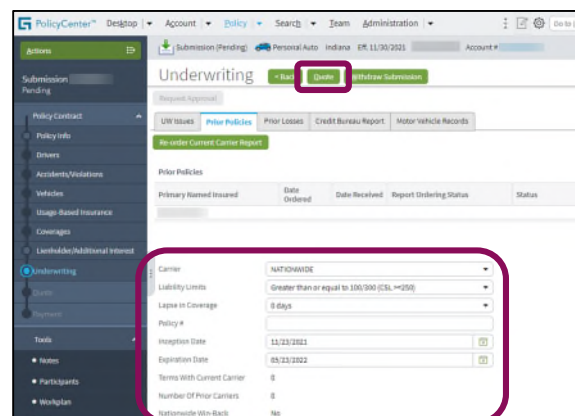
For Auto only.

Go to the “Underwriting” screen and the “Prior Policies” tab:

- Confirm the “Carrier” is Nationwide, and all information is correct.
- Select the Quote button.

Continue to [Step 4](#).

Screen



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Step 4

Action

Complete the rest of the submission as you would for any new quote.

Refer to the appropriate **Full Application job aid** (Auto, Property, or Umbrella) for step-by-step instructions.

Step 5

Action

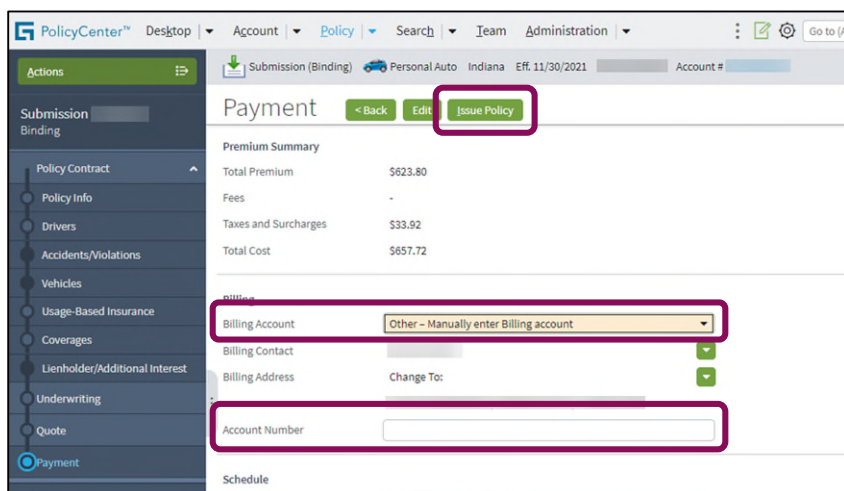
On the “Payment” screen:

- Select “Other – Manually enter Billing account” from the “Billing Account” drop-down menu.

Note: If it is Third Party billed, a new billing account is required.

- Enter the Billing Account number in the “Account Number” field.
- Select the “Issue Policy” button.
- Complete any down payment information, if required.

Screen



Step 6

Action

Once the Policy Rewrite is bound, you must return to the policyholder Account to select the “old” policy and cancel it.

Note: If the existing policy is not cancelled, customers will have duplicate coverage and be billed for two policies.

Refer to the **Cancel Policy job aid** for step-by-step instructions on how to cancel a policy.

By accepting a copy of these materials:

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