

Description:

This step-by-step job aid describes how to utilize the copy data function. The *Copy Data* option is available during the Auto/PowerSports or Property Full Application Submission process, as well as during a change Policy Transaction. Copying data from an existing Policy, Policy Change, Renewal, or a Policy Transaction to a pending Submission or Policy Transaction saves time.

In these examples, the pending submission is augmented with data from another existing policy then copied over.

Click the link for the desired policy type:

- o Auto/PowerSports
- o **Property**

Copy Data for Auto/PowerSports Policies

Step 1 **Action** Screen To start the copy process, open a pending FolicyCenter™ Desktop | ▼ Account | ▼ Policy | ▼ Search | ▼ Team Administration | ▼ Testing | ▼ Auto/PowerSports Full Submission OR Submission (Pending) Personal Auto Indiana Effective: 11/15/2021 Primary: Veruca Salt Account: 2498769018 start a new auto/PowerSports full Submission 735847 Pending Policy Info Next > Quote Withdraw Submission submission. Address has been validated. Policy Details Name Term Type This is the new submission **to** which you ###-###-#### x#### Phone Number of Terms will be copying data. Policy Address Change To: Effective Date * 11/15/2021 Accidents/Violations 2379 FOUR SEASONS PKWY Effective Date must be at least eight days after t Quote Discount. Initial quote date is the date that credit is order County PORTER On the *Policy Info* screen, complete all Usage-Based Insurance Business Type * New Business Expiration Date required fields prior to starting the copy Rate State Indiana Secondary Named Insured process. This includes the following fields: Discounts Give Privacy, Credit Report * * Yes Easy Pay Sign Up Property Product o Give Privacy, Credit Report and Notice Acceptance 03/15/2021 12:22 PM Paperless Policy Yes **Insurance Score Notice?** Financial Products * (Yes No o Does the Customer consent to consent to sharing their telematics data to be used in this quote? Traditional Life sharing their telematics data to Variable Life be used in this quote? Household Composition Nationwide Documents/Email Are there additional auto * Yes No o Easy Pay Sign Up Note: The Easy Pay Sign Up and Telematics data fields are required to be answered prior to starting the copy process. Easy Pay is not offered for PowerSports policies.



Job Aid Process (Auto/Powersports Cont.):

Step 2

Action Screen On the Policy Info screen: F PolicyCenter™ Desktop | ▼ Account | ▼ Policy | ▼ Search | ▼ Ieam Administration | ▼ Testing | ▼ ion (Pending) Rersonal Auto Indiana Effective: 11/15/2021 Primary: Veruca Salt Account: Info Next > Quote Withdraw Submission Click the **Actions** button. Sub Manager en validated. Policy Details Select "Copy Data" from the dropdown list. 2379 FOUR SEASONS PKWY ust be at least eight days afte Expiration Date 05/15/2022 Rate State Indiana * 🔽 Easy Pay Sign Up * Yes (•) Property Product 03/15/2021 12:22 PM Paperless Policy Yes Financial Products * (Yes No Variable Life

Step 3

On the Copy Policy Search Policies screen, the

Account Number field defaults to the account under which you started the quote.

Note: The **Search For** drop down includes the options to copy data from a policy, policy change, renewal, or submission. Select the appropriate option based on your scenario.

- Click the down arrow to the right of the Search For field.
- Choose "**Policy**" from the drop-down list.
- Click the **Search** button.

PolicyCenter® Desktop Account Policy Search Personal Auto Indiana Effective: 11/15/2021 Primary: Veruca Salt Account: 2498769018 Pendings Pendings Policy Contract Policy Contract Policy Info Drivers Primary Insured Information First Name Vehicles Leaf name is an exact match Leaf Name Last Name Last Name Last name is an exact match City State Policy # Policy Primary Named Insured Account # Status Account # Policy Account Number Policy Number 91133 100889 As of Date MM/dd/yyyy Search Policy Number 91133 100889 As of Date Policy Number 91134 100889 As of Date Nodata to display

Step 4

Action	Screen
In the Search Results section:	PolicyCenter** Desktop Account Submission 735847 Submission 735847 Submission 735847 Account Submission Personal Auto Indiana Effective: 11/15/2021 Primary: Venuca Salt Account 2488769018
Locate the policy to be copied.	Pending Copy Policy Search Policies Return to Policy Info Policy Info Search For Policy Account Number 2498759018
Click the Select button.	Drivers Primary Insured Information Policy Number 91133 100669 Accidente Violations First Name As of Date MM/dd/yyyy Vehicles First name is an exact match ✓
	Usage-Based Insurance Coverages Last name is an exact match Lisenholder/Additional interest City
	Underwriting State State
	Tools ◆ Notes Search Results Policy # ← Primary Named Insured ← Account # ← Status Effective Date ← Expiration Date



Job Aid Process (Auto/Powersports Cont.):

Step 5

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Action

On the *Select data to copy from Policy* #XXXX screen:

- Select all driver(s), the appropriate vehicle(s), and any vehicle-level and/or policy-level coverages. You may need to scroll down on the page to view/select all coverages.
- Click the Merge to Transaction button.

Note: This only copies Driver, Vehicle, and Coverages; *all other policy information still must be entered in the new submission.*

FolicyCenter™ Desktop | ▼ Account | ▼ Policy | ▼ Search | ▼ Team Administration | ▼ Testing | ▼ Submission (Pending) Personal Auto Indiana Effective: 11/15/2021 Primary: Veruca Salt Account: 2498769018 Select data to copy from Policy #9113J 100089 Return to Copy Policy Search Policies As of date 03/15/2022 31 Auto Line Notes Drivers Vehicles 2013 AUDI A5 2.0 QU Vehicle Coverages Include All Coverages Individual Coverages Bodily Injury Collision Comprehensive Notes Medical Payments Rental Reimbursement Underinsured Motorist Bodily Injury Uninsured Motorist Bodily Injury Uninsured Motorist Property Damage Include Additional Interests Policy Level Coverages

Screen

Step 6

Action

The *Policy Info* screen re-displays. Proceed with the remainder of the submission.

You still must complete <u>all</u> required fields on <u>all</u> screens to complete the submission. Refer to the *Create Auto Full Application* job aid for steps to complete a submission.

Note: Items like Term Type and Usage-Based Information selections are not copied over from the existing policy.

PolicyCenter" Designop | Account | Policy | Search | Ieam Administration | Testing | submission (Pending) - Personal Auto Indiana Effective: 11/15/2021 Primary: Veruca Salt Account: 249876901 Policy Info Next> Quote Withdraw Submission Address has been validated. Policy Details Wenica Salt Term Type # 6 months 888-888-8888 x5888 * 1 Policy Address Change To: Effective Date 2379 FOUR SEASONS PKWY CROWN POINT, IN 46307-9342 Effective Date must be at least eight days after Quote Discount. Initial quote date is the date that credit is orde PORTER Expiration Date Business Type 05/15/2022 Rate State Secondary Named Insured Discounts Give Privacy, Credit Report. * and Insurance Score Notice? Eany Pay Sign Up * () Yes () Property Product Notice Acceptance 03/15/2021 12:22 PM Financial Products Does the customer consent to sharing their telematics data to be used in this quote? Annuity Traditional Life Variable Life Are there additional auto * O Yes (No

Screen





Copy Data for Property Policies

Step 1

Action Screen

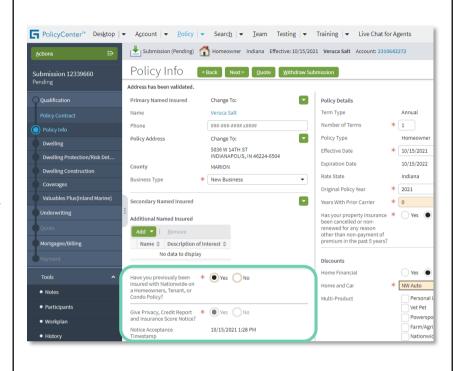
To start the copy process, open a pending Homeowner Full Submission OR start a new Homeowner full submission.

This is the new submission *to* which you will be copying data.

On the *Policy Info* screen, complete all required fields prior to starting the copy process. This includes the following fields:

- Have you previously been insured with Nationwide on a Homeowners, Tenant, or Condo Policy?
- Give Privacy, Credit Report and Insurance Score Notice?
- o Years with Prior Carrier
- Home and Car

Note: The Have you previously..., Years with Prior Carrier, and Home and Car fields are required to be answered prior to starting the copy

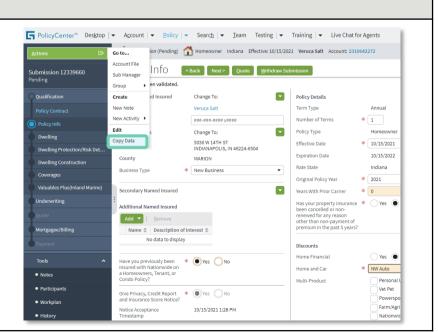


Step 2

Action

On the *Policy Info* screen:

- Click the **Actions** button.
- Select "<u>Copy Data</u>" from the dropdown list.



Screen





Job Aid Process (Property Cont.):

Step 3

On the *Copy Policy Search Policies* screen, the **Account Number** field defaults to the account under which you started the quote.

Action

Note: The **Search For** drop-down list includes the options to copy data from a policy, policy change, renewal, or submission. Select the appropriate option based on your scenario.

- Click the down arrow to the right of the Search For field.
- Choose "**Policy**" from the drop-down list.
- Click the <u>Search</u> button.

Step 4

Action In the Search Results section: Locate the policy to be copied. Click the Select button. Click the Select button.

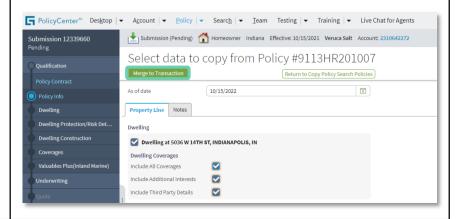
Step 5

Action Screen

On the Select data to copy from Policy #XXXX screen:

- Select all dwelling coverages. You may need to scroll down on the page to view/select all coverages.
- Click the Merge to Transaction button.

Note: This only copies Coverages; *all* other policy information still must be entered in the new submission.







Job Aid Process (Property Cont.):

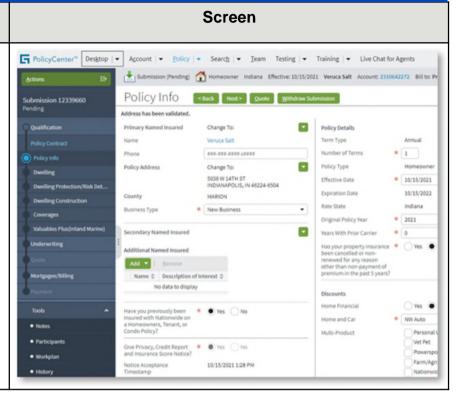
Step 6

Action

The *Policy Info* screen re-displays. Proceed with the remainder of the submission.

You still must complete <u>all</u> required fields on <u>all</u> screens to complete the submission. Refer to the *Create Auto Full Application* job aid for steps to complete a submission.

Note: Items like Term Type and Usage-Based Information selections are not copied over from the existing policy.





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.