Copy Data
PolicyCenter

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 Auto/PowerSports Full Submission OR start a new auto/PowerSports 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: o **Give Privacy, Credit Report and Insurance Score Notice?** o **Does the Customer consent to sharing their telematics data to be used in this quote?** 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.	

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Job Aid Process (Auto/Powersports Cont.) :

Step 2

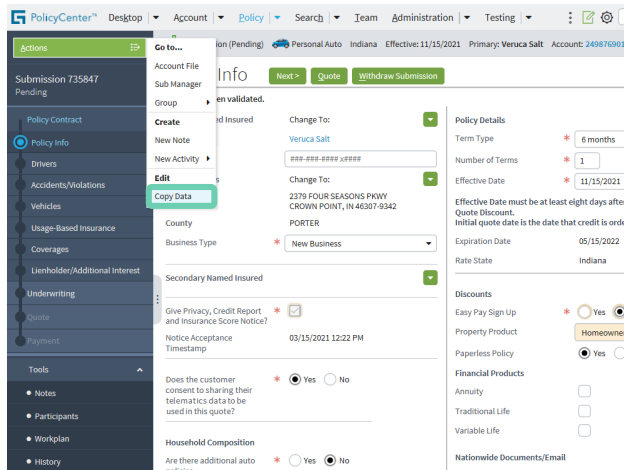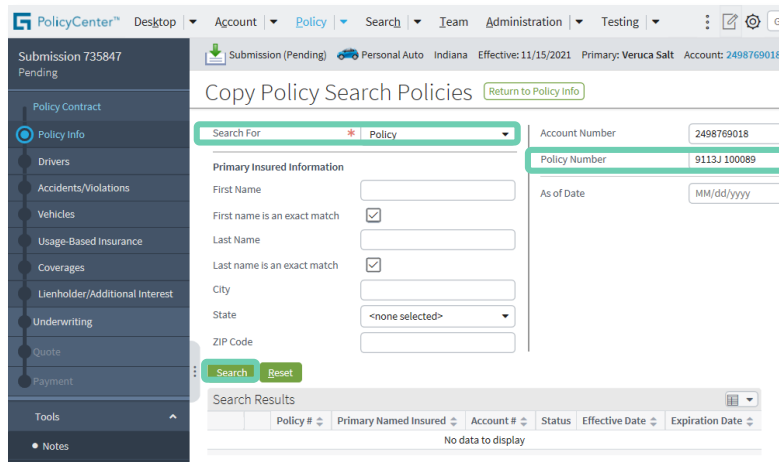| Action	Screen
On the Policy Info screen: • Click the **Actions** button. • Select "**Copy Data**" from the drop-down list.	

Step 3

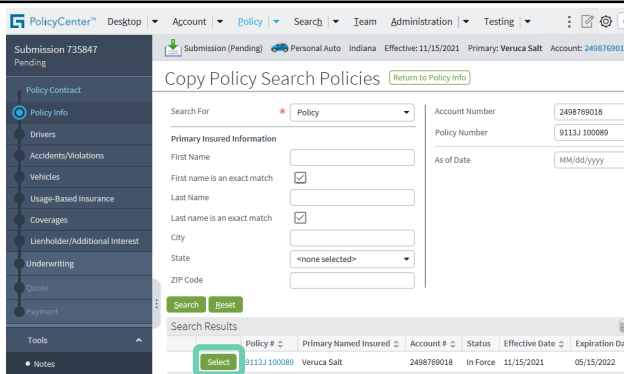| Action	Screen
On the *Copy Policy Search Policies* screen, the **Account Number** field defaults to the account under which you started the quote. **Note:** The **Search For** drop down includes the options to copy data from a policy, policy change, renewal, or submission. Select the appropriate option 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.	

Step 4

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

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Job Aid Process (Auto/Powersports Cont.) :
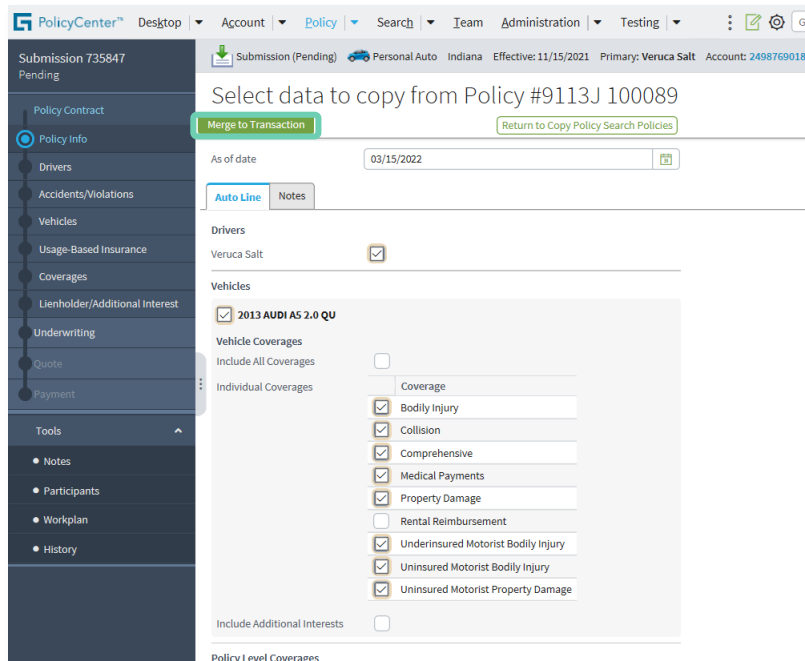
Step 5

Action	Screen
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.*	

Step 6
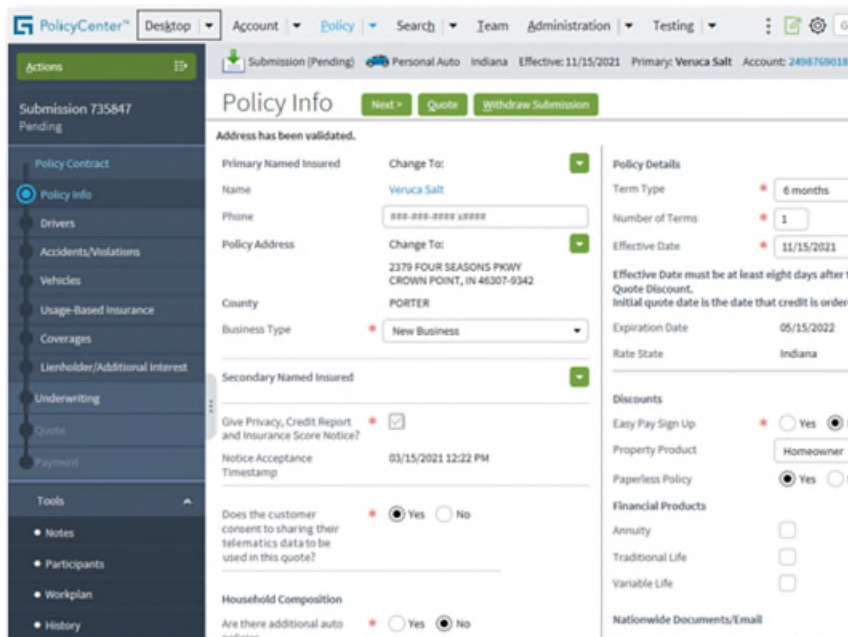
Action	Screen
The *Policy Info* screen re-displays. Proceed with the remainder of the submission. You still must complete <u>***all***</u> required fields on <u>***all***</u> screens to complete the submission. Refer to the *Create Auto Full Application* job aid for steps to complete a submission. **Note:** Items like Term Type and Usage-Based Information selections are not copied over from the existing policy.	

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Copy Data for Property Policies

Step 1

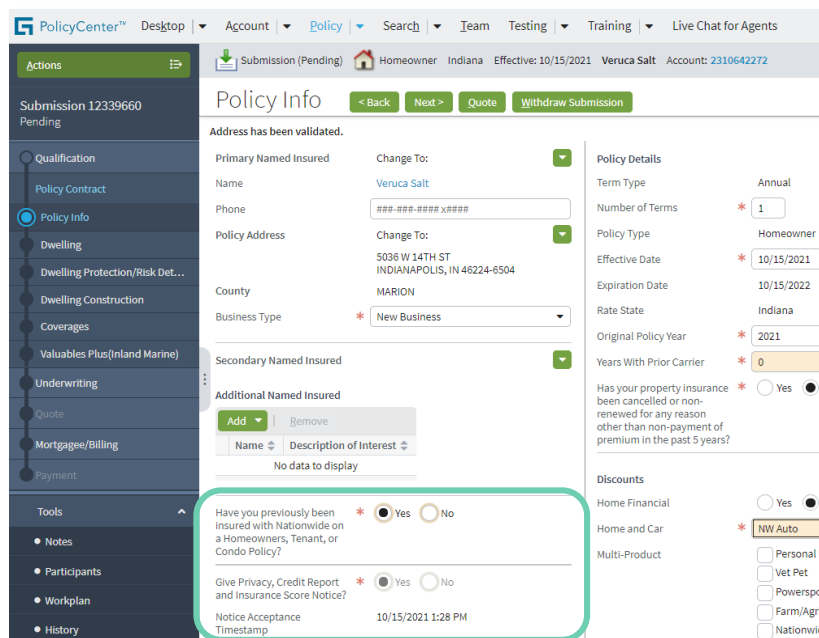| Action	Screen
To start the copy process, open a pending Homeowner Full Submission OR start a new Homeowner full submission. This is the new submission *to* which you will be copying data. On the *Policy Info* screen, complete all required fields prior to starting the copy process. This includes the following fields: o **Have you previously been insured with Nationwide on a Homeowners, Tenant, or Condo Policy?** o **Give Privacy, Credit Report and Insurance Score Notice?** o **Years with Prior Carrier** o **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
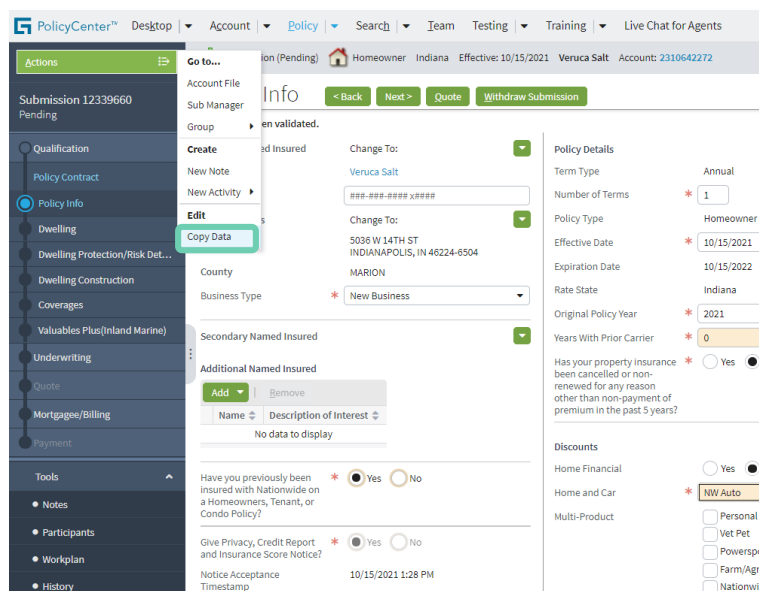
Action	Screen
On the *Policy Info* screen: • Click the **Actions** button. • Select "**Copy Data**" from the drop-down list.	

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Job Aid Process (Property Cont.) :
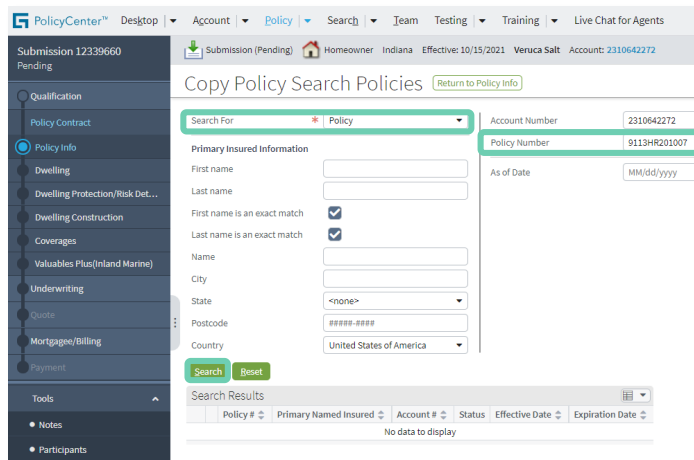
Step 3

Action	Screen
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 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 **Search** button.	
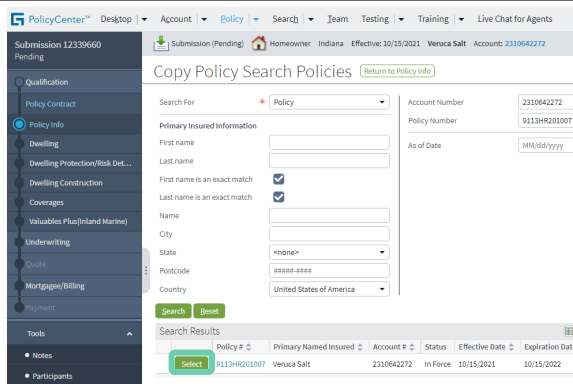
Step 4

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

Step 5
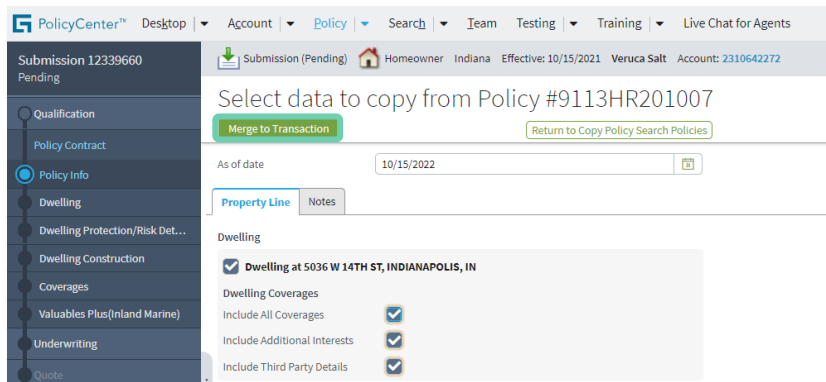
Action	Screen
On the *Select data to copy from Policy #XXXX* screen: • Select all dwelling coverages. You may need to scroll down on the page to view/select all coverages. • Click the **Merge to Transaction** button. **Note:** This only copies Coverages; *all other policy information still must be entered in the new submission.*	

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Job Aid Process (Property Cont.) :
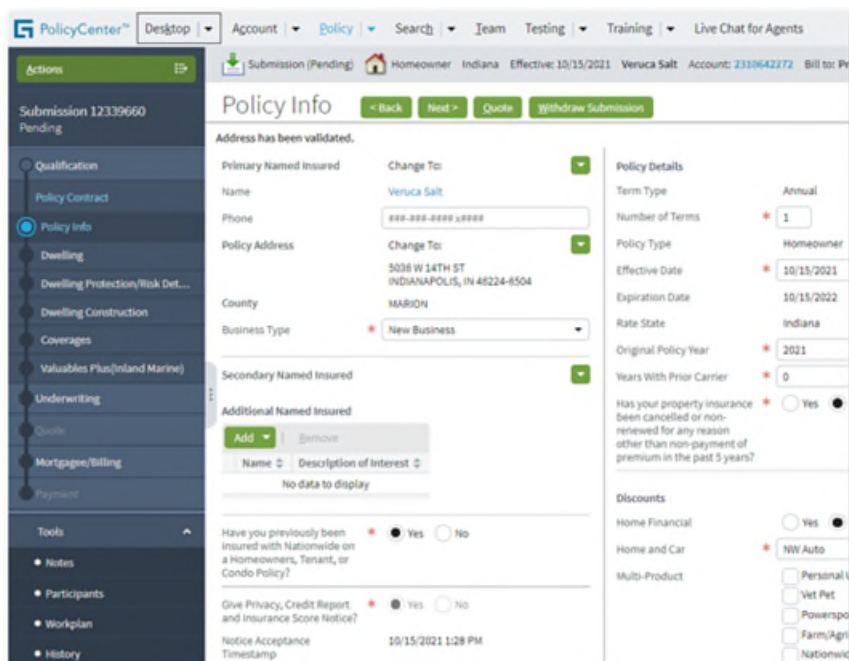
Step 6

Action	Screen
The *Policy Info* screen re-displays. Proceed with the remainder of the submission. You still must complete **_all_** required fields on **_all_** 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.	