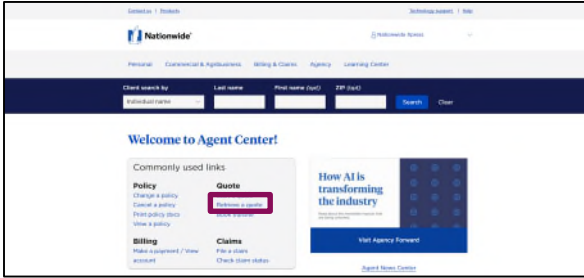


Start and/or Retrieve a Quote Using Nationwide Express

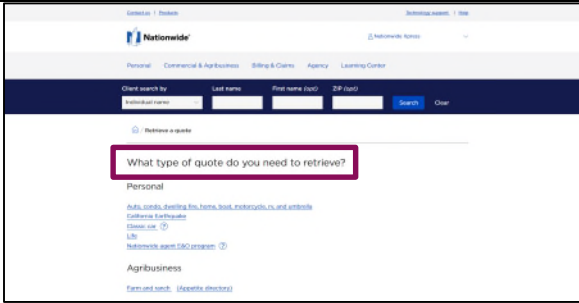


Retrieve a Quote

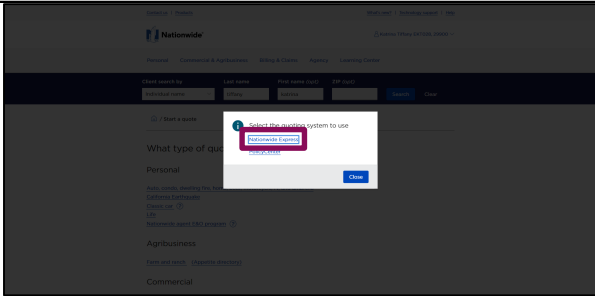
Step 1

Action	Screen
<p>When you started a quote and now want to continue and bind the policy, retrieve the quote from Agent Center Workspace.</p> <p>From “Commonly used links”, “Quote” section, select “Retrieve a quote.”</p>	

Step 2

Action	Screen
<p>Agent Center asks “What type of quote do you need to retrieve?”</p> <p>Select the first hyperlink under the “Personal” section: “Auto, condo, dwelling fire, home, boat, motorcycle, rv and umbrella”</p>	

Step 3

Action	Screen
<p>You have the option to select Nationwide Express or PolicyCenter as the quoting system you want to use. For this job aid, select “Nationwide Express”.</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.

Retrieve a Quote (cont'd)

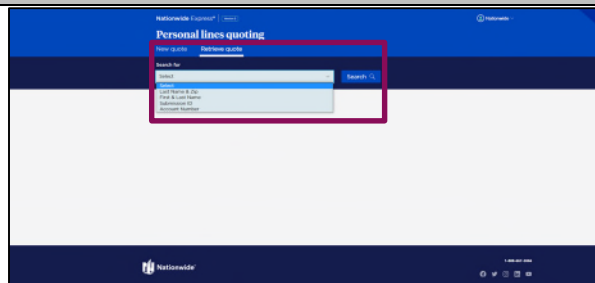
Step 4

Action

“Retrieve Quote” in Nationwide Express displays. You have several ways to pull the quote. Select the option that works best and select the “Search” button.

Quotes from Nationwide Express are accessible here for 30 days from creation date.

Screen



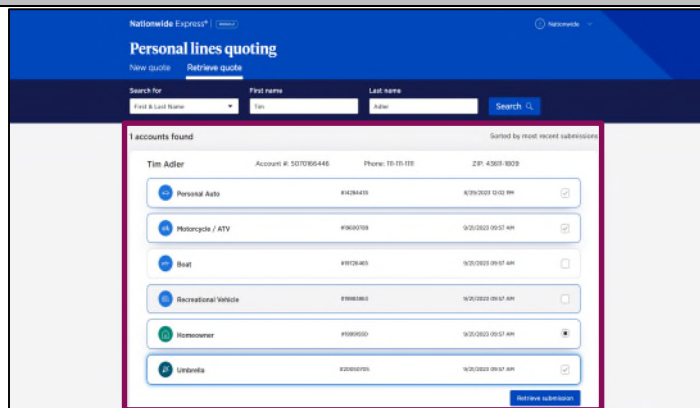
Step 5

Action

Your search results display with all recent activity. This example shows that this client has multiple products quoted for him; however, you don't have to view them all.

You have the option to retrieve a single product or multiple for review. Once you've selected the desired product(s), select the “Retrieve submission” button. The other submissions will remain available for you to come back to later.

Screen

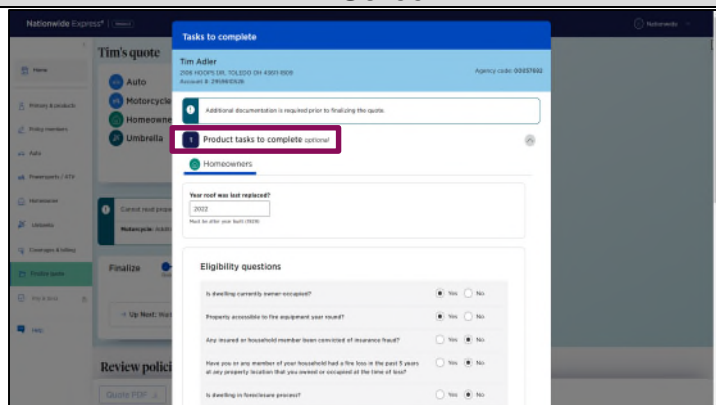


Step 6

Action

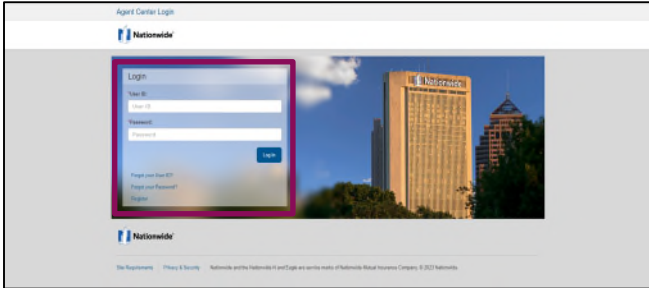
When you retrieve a quote, if there are any tasks that need completed, a pop-up listing of those tasks display. This screen indicates that there are “Property tasks to complete”, or it could be policy effective dates. Review and correct if the effective date is prior to today's date. Nationwide Express does not allow for backdating.

Screen

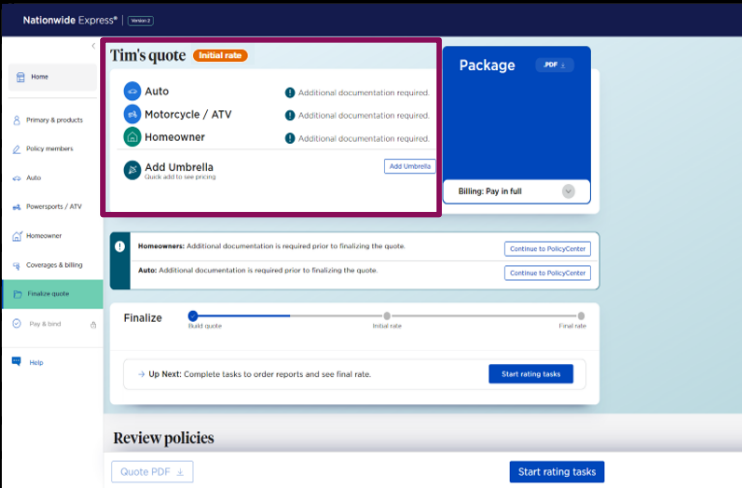


Start Quote in a Comparative Rater

Step 1

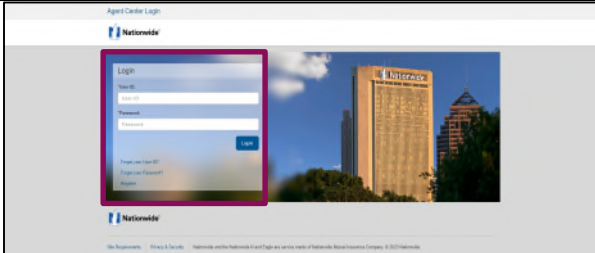
Action	Screen
When you bridge to Nationwide from your rater, you'll be taken to the Agent Center login page for validation, unless you already logged in within the last couple of hours. If you stay active, you'll only need to log in once a day, but it will time out. You must be logged into Nationwide to go any further.	

Step 2

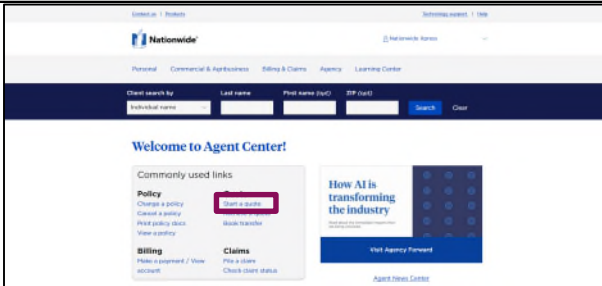
Action	Screen
<p>Bridging to Nationwide Express will transfer all data entered from your rater. You may receive a message(s) for one or multiple product types.</p> <p>When a rate is provided, it is still an initial rate (see the orange button). Before receiving a bindable rate, you'll need to review telematics and complete rating tasks.</p> <p>Credit and prior carrier reports were ordered, as well as loss history and reconstruction cost info for the homeowner policy. We still need MVR and CLUE reports before we have a bindable rate.</p>	

Start a Quote in Agent Center

Step 1

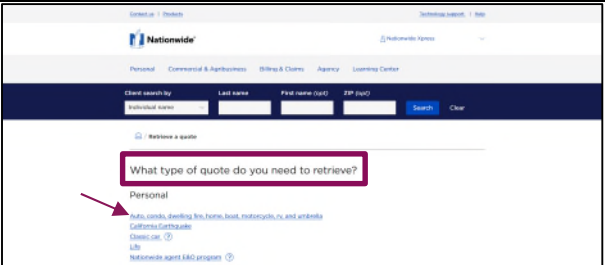
Action	Screen
If you aren't already logged into Nationwide, you'll need your credentials to log in through agentcenter.nationwide.com.	

Step 2

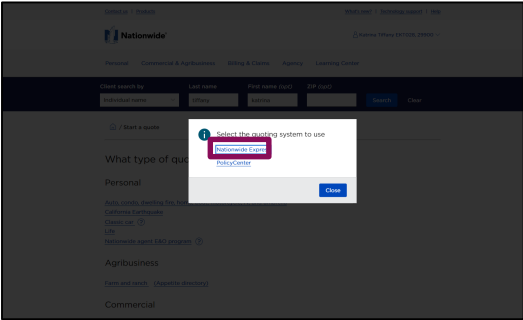
Action	Screen
If you do not use a comparative rater and are starting a quote from scratch in Agent Center Workspace you can reduce the number of clicks by selecting "Start a Quote" under the "Quote" section in "Commonly used links".	

Start a Quote in Agent Center (cont'd)

Step 3

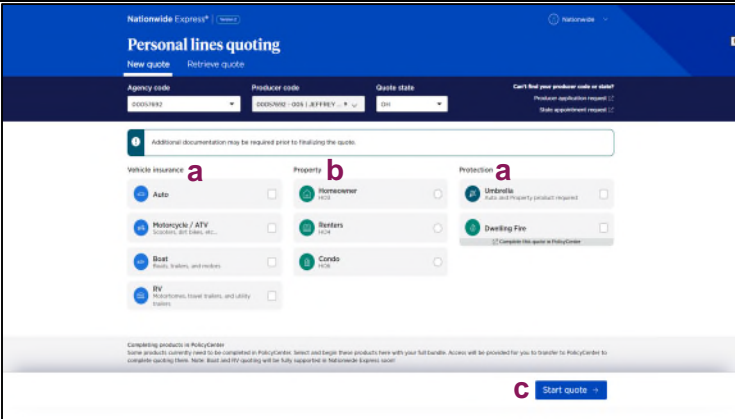
Action	Screen
<p>Agent Center asks “What type of quote do you need to retrieve?”</p> <p>Select the first hyperlink under the “Personal” section: “Auto, condo, dwelling fire, home, boat, motorcycle, RV and umbrella”</p>	

Step 4

Action	Screen
<p>You have the option to select Nationwide Express or PolicyCenter to quote. Using Nationwide Express is recommended, as it is programmed to ensure that your prospect is a good fit for Nationwide’s appetite and expedites your experience.</p>	

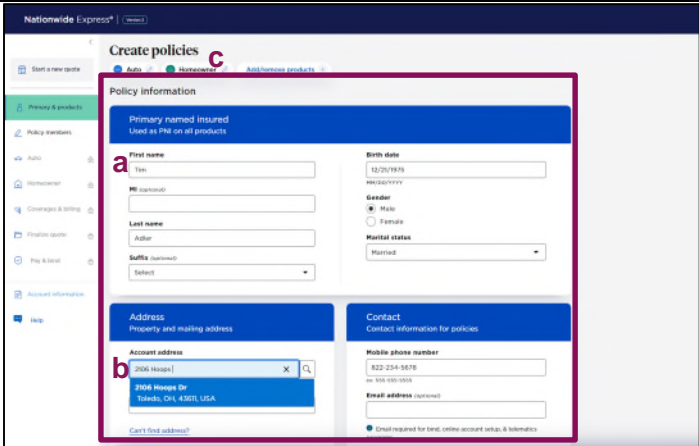
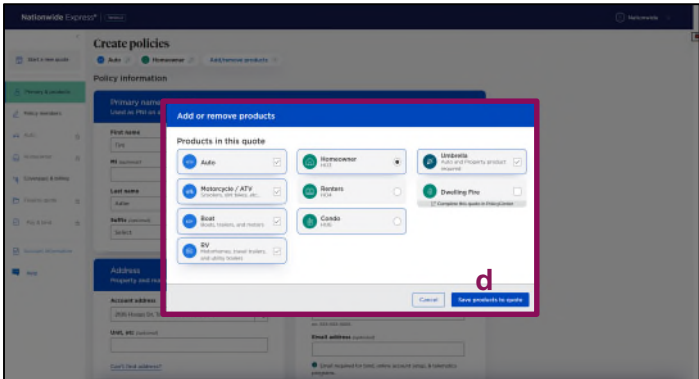
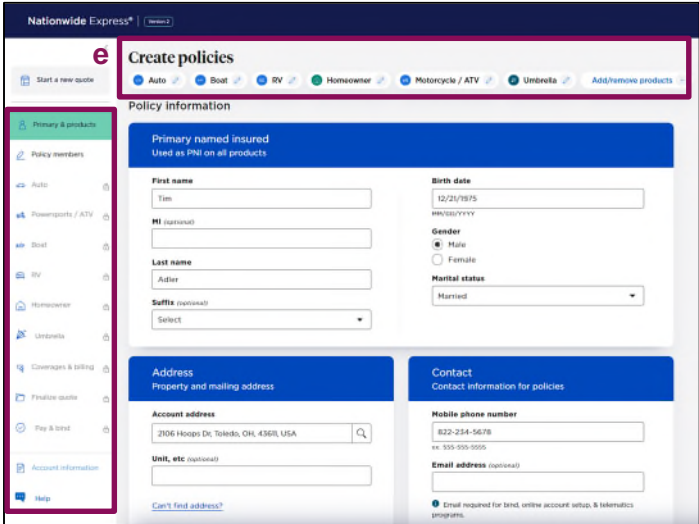
Start a Quote in Nationwide Express

Step 1

Action	Screen
<p>This is the landing page to start a quote in Nationwide Express. To start, enter “Agency code”, “Producer code” and “Quote state”.</p> <ol style="list-style-type: none"> The “Vehicle insurance” and “Protection” columns have checkboxes to select from as you can select a mix of Auto, Powersports, and Umbrella. The “Property” column has radio buttons since you can only select a single homeowner product. <p>Each product selected will be on its own policy but will be grouped at the end for issue and downpayment.</p> <ol style="list-style-type: none"> Once you select the policies to quote, select the “Start quote” button. <p>Note: You can select “Dwelling Fire” in Nationwide Express; however, you will need to complete this quote in PolicyCenter. If you are including Dwelling Fire in your quote, we recommend you start in Nationwide Express as the information you enter in this system will move over to PolicyCenter for the Dwelling Fire quote.</p>	 <p>Note: Boat and RV can be selected on this screen if you’re quoting in any Nationwide states except MA, NJ or OK. When adding Boats and RVs in some states, you’ll see the same message as is displayed on Dwelling Fire. Meaning you would need to complete the quote in PolicyCenter. This is the same message on any other product in a particular state that requires a completion of the quote in PolicyCenter.</p> <p>Nationwide Express reminds you of the next steps on quoting these products in PolicyCenter later on in the Nationwide Express quote process.</p>

Start a Quote in Nationwide Express (cont'd)

Step 2

Action	Screen
<p>a. The “Policy information” screen displays. Select the “Primary named insured” section to provide initial details. If you used a computer to access Nationwide Express, this information will carry over.</p> <p>b. As you enter an address, options will pop-up for you to choose the correct information.</p> <p>c. Notice below the “Create policies” heading that you can add or remove products as needed by selecting the “Add/remove products” button.</p> <p>d. Select what the insured needs and select the “Save products to quote” button.</p> <p>e. Now the additional products are on the top and left navigation panel.</p> <p>You can navigate the quote by using the top buttons on the screen or the links in the navigation panel. Links stay locked until you enter enough information to unlock them.</p>	  

Start a Quote in Nationwide Express (cont'd)

Step 3

Action

The system searches for an account match based on the following criteria:

- Account number
- First name and last name
- Last name, city, and state
- Last name and postal code
- Phone number

If an account is found, you can add quotes and binds to an already present PolicyCenter account by selecting the "Link account" button.

Screen

Step 4

Action

- Email address is required for online account set-up and telematics, but customers can opt for paper documents.
- As you discuss that option, remember the paperless policy discount on the auto will be removed if you select US mail.
- Make sure to answer the document delivery question. Click on the question mark if you are not sure what to select.

Screen

Step 5

Action

The "Policy Members" page allows you to add additional people to the quote. Customer pre-fill will provide possible additional policy members, pulling from public records for anyone associated with the prospect or the address.

In our example, when we come to the Policy Members page, Tim's information has carried over as Primary Named Insured and any other potential drivers to be added may be here for us to add.

If Michelle is a driver in the household, we can add her by checking the box. If drivers are displayed and they should not be added, just leave them unchecked, but be aware that you may be asked to explain why they have not been added.

Screen

Start a Quote in Nationwide Express (cont'd)

Step 6

Action

You can select the driver type as needed. The “Auto driver type” dropdown will allow you to select the appropriate option based on state regulations.

You may see other questions based on the product(s) you are quoting

Driver’s license numbers are not required for quoting but are required for performing rating tasks before binding.

Screen

Step 7

Action

Discount questions are indicated by green bars. These may vary from state to state and driver to driver.

The “Multi product discount” question rounds out this section. Select any other Nationwide products for discount purposes.

Note: Selecting additional products will not connect your Nationwide Express quote with any active submissions or policies in PolicyCenter.

Screen