Search and Navigate Through a Policy

In Brief

Use this Quick Card to search for and navigate a policy and look for key information. This Quick Card will cover each policy type (auto, property and umbrella) and the information you may view on each policy type.

Log in to the VTO using the appropriate generic user account from the **VTO Information Guide** document.

Quick Card

Search and Navigate Through an Auto Policy

Search for a policy number listed below.

IMPORTANT: For the purposes of the VTO, you can use the policy number below. Ensure you use the appropriate spacing when searching for a policy number.

Auto Policy
9113K 501981

Desktop screen

1. Click the down arrow to the right of the **Policy** tab.
2. Enter the policy number listed above in the **Policy #** field.
3. Hit **Enter** to display the policy.

Summary screen

4. Review policy information using the *Left Navigation Bar* on the left side of the screen.
5. Click the **Policy Info** link.

Policy Info screen

6. Review the **Name** and **Address** of the Primary Named Insured.
7. Review the policy's **Effective Date** and **Expiration Date** in the *Policy Details* section.
8. Click the **Drivers** link.

Drivers screen

9. Click the line item for each driver to view additional information.
10. Click the **Accidents/Violations** link.

Accidents/Violations screen

11. Click the line item for Driver #2 to view additional information.
12. Click the **Vehicles** link.

Vehicles screen

13. Click the line item for each vehicle to view additional information.
14. Click the **Usage Based Insurance** link.

Usage-Based Insurance screen

15. Click the line item for each vehicle to view the vehicle's enrollment in SmartRide or SmartMiles, if applicable.
16. Click the **Coverages** link.

Coverages screen

17. Review the coverages listed for each vehicle.
18. Click the **Lienholder/Additional Interest** link.

Lienholder/Additional Interest screen

19. Click the line item for each vehicle to view additional information.
20. Click the **Quote** link.

Quote screen

21. Review the policy's premium information.
22. Click the **Summary** link.

Summary screen

21. Review the list of **Current Activities**, if applicable.
22. Review the list of **Completed Policy Transactions**.
23. Review the list of **Pending Policy Transactions**, if applicable.
24. Review the list of **Recent Notes**, if applicable.
25. Click the **Contacts** link.

Contacts screen

26. Review the contacts (household members) associated with the policy.
27. Click the **Participants** link.

Participants screen

28. Review the list of users associated with the policy. This section lists all the Nationwide users that touched the policy.
29. Click the **Notes** link.

Notes screen

30. Review the notes associated with the policy.
31. Click the **Available Coverages** link.

Available Coverages screen

32. Review the list of coverages associated with the policy.
33. Click the **Documents** link.

Documents screen

34. Review the documents associated with the policy.
35. Click the **Trailing Documents** link.

Trailing Documents screen

36. Review the trailing documents associated with the policy.
37. Click the **Policy Transactions** link.

Policy Transactions screen

38. Review list of policy transactions associated with the policy.
39. Click each line item to view additional information, if applicable.
40. Click the **Underwriting** link.

Underwriting screen

41. Review any underwriting issues associated with the policy.
42. Click the **History** link.

History screen

43. Review the actions taken on the policy.
44. Click the **Financial Transactions** link.

Financial Transactions screen

45. Review the policy's premium changes by reviewing each of the following links:
    - All Transactions
    - Transactions by Job
    - Transactions by Period

Search and Navigate Through a Property Policy

Search for a policy number listed below.

IMPORTANT: For the purposes of the VTO, you can use the policy number below. Ensure you use the appropriate spacing when searching for a policy number.

Property Policy
9113HR001014

Desktop screen

1. Click the down arrow to the right of the **Policy** tab.
2. Enter the policy number listed above in the **Policy #** field.
3. Hit **Enter** to display the policy.

Summary screen

4. Review policy information using the *Left Navigation Bar*, on the left side of the screen.
5. Click the **Policy Info** link.

Policy Info screen

6. Review the **Name** and **Address** of the Primary Named Insured.
7. Review the policy's **Effective Date** and **Expiration Date** in the *Policy Details* section.
8. Click the **Dwelling** link.

Dwelling screen

9. Review the location name, location details and geographical data.
10. Click the **Dwelling Protection/Risk Details** link.

Dwelling Protection/Risk Details screen

11. Review the dwelling protections and risk details.
12. Click the **Dwelling Construction** link.

Dwelling Construction screen

13. Review the detailed information on the screen.
14. Click the **Coverages** link.

Coverages screen

15. Review the policy coverages and limits.
16. Click the **Valuables Plus (Inland Marine) screen** link.

Valuables Plus (Inland Marine) screen

17. Review the valuables plus and valuables plus blanket coverages.
18. Click the **Quote** link.

Quote screen

19. Review the policy's premium information.
20. Click the **Mortgagee/Billing** link.

Mortgagee/Billing screen

21. Review the lienholder and additional interest information.
22. Click the **Summary** link.

Summary screen

23. Review the list of **Current Activities**, if applicable.
24. Review the list of **Completed Policy Transactions**.
25. Review the list of **Pending Policy Transactions**, if applicable.
26. Review the list of **Recent Notes**, if applicable.
27. Click the **Contacts** link.

Contacts screen

28. Review the contacts (household members) associated with the policy.
29. Click the **Participants** link.

Participants screen

30. Review the list of users associated with the policy. This section lists all the Nationwide users that touched the policy.
31. Click the **Notes** link.

Notes screen

32. Review the notes associated with the policy.
33. Click the **Available Coverages** link.

Available Coverages screen

34. Review the list of coverages associated with the policy. Policies not chosen, but available, are in lighter gray.
35. Click the **Documents** link.

Documents screen

36. Review the documents associated with the policy.
37. Click the **Trailing Documents** link.

Trailing Documents screen

38. Review the trailing documents associated with the policy.
39. Click the **Policy Transactions** link.

Policy Transactions screen

40. Review list of policy transactions associated with the policy.
41. Click each line Policy Transaction to view additional information, if applicable.
42. Click the **Underwriting** link.

Underwriting screen

43. Review any underwriting issues associated with the policy.
44. Click the **History** link.

History screen

45. Review the actions taken on the policy.
46. Click the **Financial Transactions** link.

Financial Transactions screen

47. Review the policy's premium changes by reviewing each of the following links:
    - All Transactions
    - Transactions by Job
    - Transactions by Period

Search and Navigate Through an Umbrella Policy

Search for a policy number listed below.

IMPORTANT: For the purposes of the VTO, you can use the policy number below. Ensure that you use the appropriate spacing when searching for a policy number.

Umbrella Policy
9113PU400641

Desktop screen

1. Click the down arrow to the right of the **Policy** tab.
2. Enter the policy number listed above in the **Policy #** field.
3. Hit **Enter** to display the policy.

Summary screen

4. Review policy information using the*Left Navigation Bar*, on the left side of the screen.
5. Click the **Policy Info** link.

Policy Info screen

6. Review the **Name** and **Address** of the Primary Named Insured.
7. Review the policy's **Effective Date** and **Expiration Date** in the *Policy Details* section.
8. Click the **Underlying Policies** link.

Underlying Policies screen

9. Review underlying policy information.
10. Click each **Policy Type** line item to view additional information about each underlying policy.
11. Click the **Household Members** link.

Household Members screen

12. Review the household members listed on the policy.
13. Click each household member line item to view additional information.
14. Click the **Vehicle Exposures** link.

Vehicle Exposures screen

15. Review the vehicles listed on the policy.
16. Click each vehicle line item to view additional information.
17. Click the **Location Exposures** link.

Location Exposures screen

18. Review the location exposure address.
19. Click the **Dwelling Details** tab to view additional information about the location.
20. Click the **Coverages** link.

Coverages screen

21. Review the primary, underlying, and other available coverages, if applicable.
22. Click the **Quote** link.

Quote screen

23. Review the policy's premium information.
24. Click the **Summary** link.

Summary screen

25. Review the list of **Current Activities**, if applicable.
26. Review the list of **Completed Policy Transactions**.
27. Review the list of **Pending Policy Transaction**, if applicable.
28. Review the list of **Recent Notes**, if applicable.
29. Click the **Contacts** link.

Contacts screen

30. Review the contacts (household members) associated with the policy.
31. Click the **Participants** link.

Participants screen

32. Review the list of users associated with the policy. This section lists all the Nationwide users that touched the policy.
33. Click the **Notes** link.

Notes screen

34. Review the notes associated with the policy.
35. Click the **Available Coverages** link.

Available Coverages screen

36. Review the list of coverages associated with the policy.
37. Click the **Documents** link.

Documents screen

38. Review the documents associated with the policy.
39. Click the **Trailing Documents** link.

Trailing Documents screen

40. Review the trailing documents associated with the policy.
41. Click the **Policy Transaction** link.

Policy Transactions screen

42. Review list of policy transactions associated with the policy.
43. Click each transaction line item to view additional information, if applicable.
44. Click the **Underwriting** link.

Underwriting screen

45. Review any underwriting issues associated with the policy.
46. Click the **History** link.

History screen

47. Review the actions taken on the policy.
48. Click the **Financial Transactions** link.

Financial Transactions screen

49. Review the policy's premium changes by reviewing each of the following links:
    - All Transactions
    - Transactions by Job
    - Transactions by Period