



Issue a Remarketing Submission

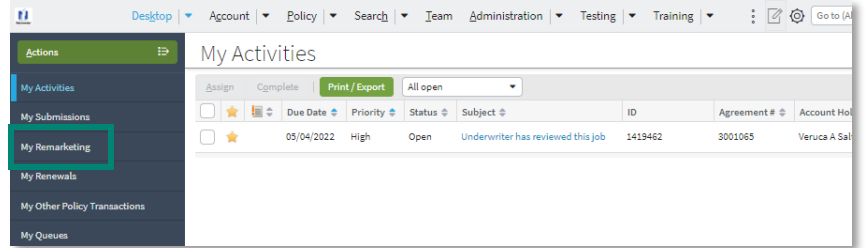
Background:

A Remarketing Processor creates a remarketing submission and sends it to the Agent for review. An Agent must review the submission then decide whether to issue the policy.

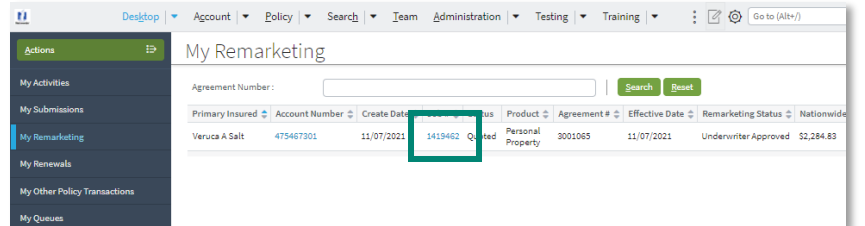
Description:

This job aid describes the step-by-step process how to issue a Remarketing submission.

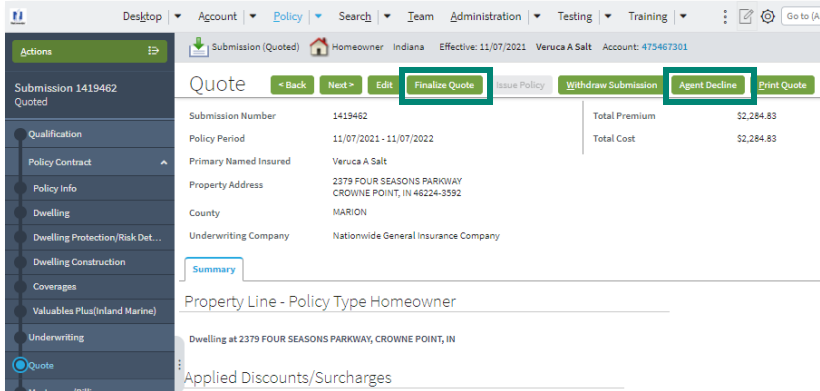
Step 1

Action	Screen												
<p>On the <i>Desktop</i> screen:</p> <ul style="list-style-type: none">Click the My Remarketing link in the left Nav bar.	 <table><tr><th>Assign</th><th>Complete</th><th>Print / Export</th><th>All open</th></tr><tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr><tr><td>05/04/2022</td><td>High</td><td>Open</td><td>Underwriter has reviewed this job</td></tr></table>	Assign	Complete	Print / Export	All open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05/04/2022	High	Open	Underwriter has reviewed this job
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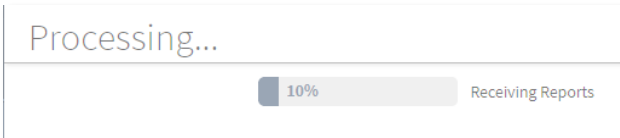
Step 2

Action	Screen																				
<p>On the <i>My Remarketing</i> screen.</p> <ul style="list-style-type: none">Click the Job # link for the remarketed policy to process.	 <table><tr><th>Agreement Number</th><th>Primary Insured</th><th>Account Number</th><th>Create Date</th><th>Status</th><th>Product</th><th>Agreement #</th><th>Effective Date</th><th>Remarketing Status</th><th>Nationwide</th></tr><tr><td></td><td>Veruca A Salt</td><td>475467301</td><td>11/07/2021</td><td>1419462</td><td>Quoted</td><td>Personal Property</td><td>3001065</td><td>11/07/2021</td><td>Underwriter Approved \$2,284.83</td></tr></table>	Agreement Number	Primary Insured	Account Number	Create Date	Status	Product	Agreement #	Effective Date	Remarketing Status	Nationwide		Veruca A Salt	475467301	11/07/2021	1419462	Quoted	Personal Property	3001065	11/07/2021	Underwriter Approved \$2,284.83
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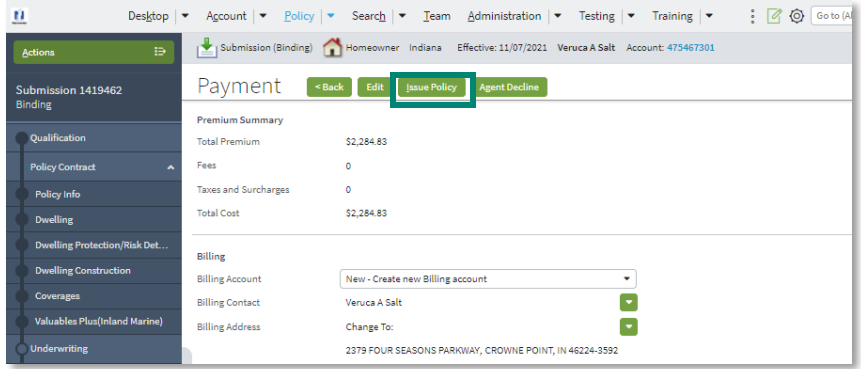
Step 3

Action	Screen
<p>On the <i>Quote</i> screen:</p> <p>Review the remarketing submission, then verify if the member would like to move forward with this submission.</p> <p>If the member does not want to move forward with the submission, click the Agent Decline button.</p> <p>If the member does want to move forward with the submission, click the Finalize Quote button.</p> <p>In this example, the member would like to move forward with the remarketing property submission. Click the Finalize Quote button.</p> <p>Click the OK button on the confirmation pop-up window.</p>	

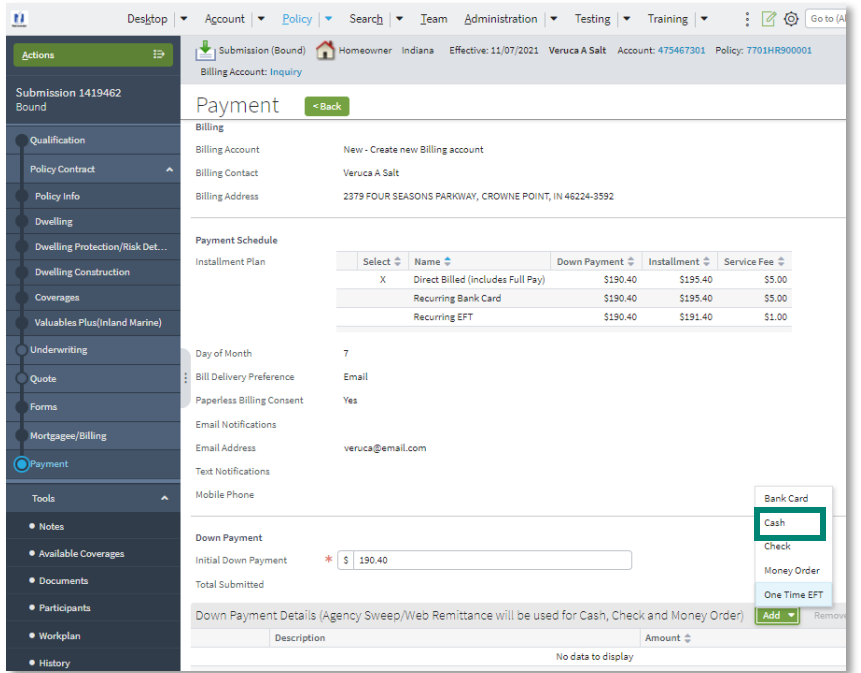
Step 4

Action	Screen
<p>Clicking the Finalize Quote button orders the MVR report for Auto submissions and places the submission in <i>Binding</i> status. After binding the policy, if no incidents are found on the report, you can advance to the <i>Payment</i> screen, enter the billing information, and issue the policy.</p> <p>If discrepancies are found in the reports, the bind process stops, and a review of the report is required, allowing you to take the appropriate action. After resolving any discrepancies, you must quote and finalize the quote again, before moving to the <i>Payment</i> screen and issuing the policy.</p> <p>The system displays a progress bar as a visual cue of running validations report ordering. Once validations are complete, the system automatically displays the <i>Payment</i> screen.</p> <p>Note: If a validation or report fails, PolicyCenter continues to display a validation message, warning, or Underwriting rule on the impacted screen.</p>	

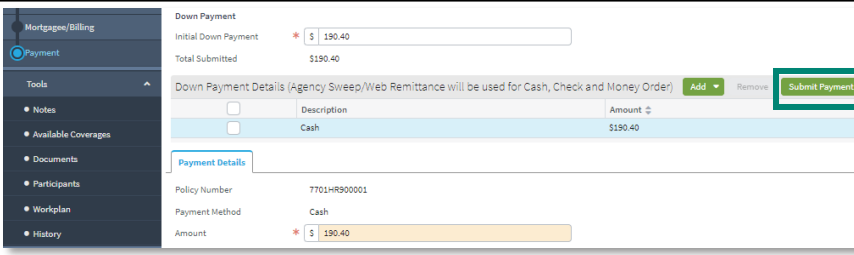
Step 5

Action	Screen
<p>On the <i>Payment</i> screen:</p> <p>Complete the required billing information. Required fields include:</p> <ul style="list-style-type: none"> • Installment Plan selection • Day of the Month (defaults to the Effective Date of the submission) • Bill Delivery Preference • Paperless Billing Consent • Email Address (if Paperless Billing Consent is chosen) <ul style="list-style-type: none"> • Click the Issue Policy button. • Click the OK button on the confirmation pop-up window. 	 <p>The screenshot shows the 'Payment' screen with the 'Billing' section expanded. The 'Issue Policy' button is highlighted in green. The 'Billing Account' dropdown is set to 'New - Create new Billing account'. The 'Billing Contact' is 'Veruca A Salt' and the 'Billing Address' is '2379 FOUR SEASONS PARKWAY, CROWNE POINT, IN 46224-3592'.</p>

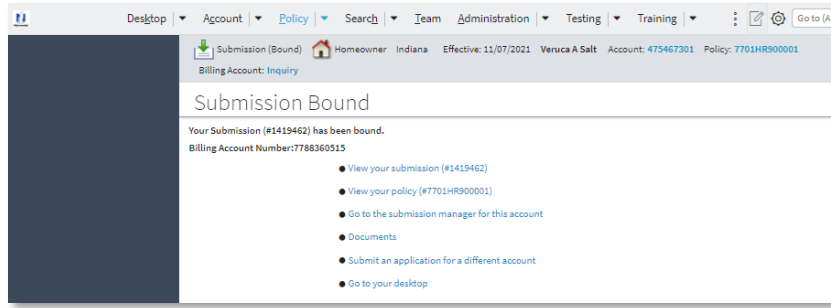
Step 6

Action	Screen
<p>Next, complete the <i>Down Payment Details</i> information. The Initial Down Payment is the amount which must be submitted for down payment. You may need to scroll down to the bottom of the <i>Payment</i> screen to locate the <i>Down Payment</i> section.</p> <ul style="list-style-type: none"> • Click the Add button. <p>Note: You may add up to four down-payment methods.</p> <ul style="list-style-type: none"> • In this example, select Cash from the drop-down list. <p>Note: In certain circumstances, like Billing to a 3rd Party Mortgagee or adding the policy to an existing billing account, a down payment is not required. However, it is recommended to accept a down payment when possible.</p>	 <p>The screenshot shows the 'Payment' screen with the 'Down Payment' section expanded. The 'Add' button is highlighted in green. The 'Down Payment' section shows 'Initial Down Payment' as '\$ 190.40' and 'Total Submitted' as '\$ 190.40'. The 'Down Payment Details' table is empty, showing 'No data to display'.</p>

Step 7

Action	Screen
<p>In the <i>Payments Details</i> section:</p> <ul style="list-style-type: none"> Review the down payment details and adjust as necessary. Enter the down payment amount in the Amount field. Click the Submit Payment button. 	

Step 8

Action	Screen
<p>The <i>Submission Bound</i> screen displays. This indicates the submission is bound, the Billing Account successfully created, and the down payment accepted.</p>	

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