



# Issue a Remarketing Submission

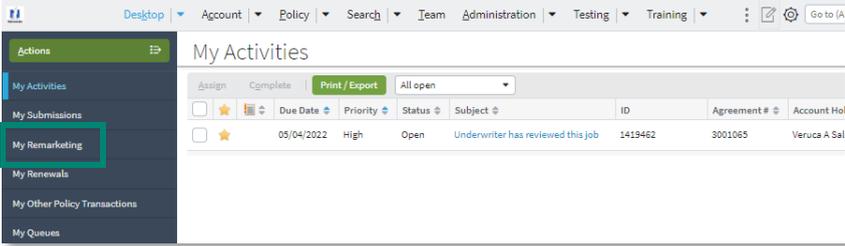
## Background:

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.

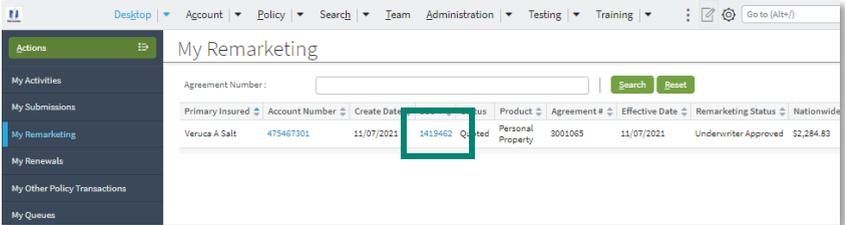
## Description:

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"> <li>Click the <b>My Remarketing</b> link in the left Nav bar.</li> </ul>	 <table border="1"> <thead> <tr> <th>Design</th> <th>Complete</th> <th>Print / Export</th> <th>All open</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> </tr> <tr> <th>Due Date</th> <th>Priority</th> <th>Status</th> <th>Subject</th> <th>ID</th> <th>Agreement #</th> <th>Account Ho</th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>05/04/2022</td> <td>High</td> <td>Open</td> <td>Underwriter has reviewed this job</td> <td>1419462</td> <td>3001065</td> <td>Veruca A Salt</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Design	Complete	Print / Export	All open							Due Date	Priority	Status	Subject	ID	Agreement #	Account Ho				05/04/2022	High	Open	Underwriter has reviewed this job	1419462	3001065	Veruca A Salt			
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### Step 2

Action	Screen																		
<p>On the <i>My Remarketing</i> screen.</p> <ul style="list-style-type: none"> <li>Click the Job # link for the remarketed policy to process.</li> </ul>	 <table border="1"> <thead> <tr> <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> </thead> <tbody> <tr> <td>Veruca A Salt</td> <td>475467301</td> <td>11/07/2021</td> <td>1419462</td> <td>Quoted Personal Property</td> <td>3001065</td> <td>11/07/2021</td> <td>Underwriter Approved</td> <td>\$2,284.83</td> </tr> </tbody> </table>	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 <b>Agent Decline</b> button.</p> <p>If the member does want to move forward with the submission, click the <b>Finalize Quote</b> button.</p> <p>In this example, the member would like to move forward with the remarketing property submission. Click the <b>Finalize Quote</b> button.</p> <p>Click the <b>OK</b> button on the confirmation pop-up window.</p>	

## Step 4

Action	Screen
<p>Clicking the <b>Finalize Quote</b> 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><b>Note:</b> 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"> <li>• <b>Installment Plan</b> selection</li> <li>• <b>Day of the Month</b> (defaults to the Effective Date of the submission)</li> <li>• <b>Bill Delivery Preference</b></li> <li>• <b>Paperless Billing Consent</b></li> <li>• <b>Email Address</b> (if <b>Paperless Billing Consent</b> is chosen)</li> </ul> <ul style="list-style-type: none"> <li>• Click the <b>Issue Policy</b> button.</li> <li>• Click the <b>OK</b> button on the confirmation pop-up window.</li> </ul>	<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"> <li>• Click the <b>Add</b> button.</li> </ul> <p><b>Note:</b> You may add up to four down-payment methods.</p> <ul style="list-style-type: none"> <li>• In this example, select <b>Cash</b> from the drop-down list.</li> </ul> <p><b>Note:</b> 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 'Initial Down Payment' is set to '\$ 190.40'. A dropdown menu is open, showing 'Cash' selected. The 'Total Submitted' is \$190.40. The 'Down Payment Details' table is empty.</p>

## Step 7

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

## 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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