

How to Use Reference Connect (Personal Lines)



Description

This job aid will show you how to use Reference Connect to search for, locate, and view Personal Lines forms and manuals. Reference Connect is your resource to quickly locate manuals and forms. Manuals include underwriting guidelines and state specific payment options. Standardized policy contracts and endorsements are located under Forms.

Access Reference Connect

Step 1

| Action | Screen |
|--|--------|
| <p>You can access Reference Connect from the Agent Center Workspace. Select the “Personal” tab, “Underwriting & Product Manuals” section.</p> <p>Note: If you receive a login screen indicating “Access denied”, select the “Technology support” link at the top, right of Agent Center Workspace for help. You may need to partner with your Agency Admin to ensure your permissions are set up in Agent Center correctly.</p> | |

Step 2

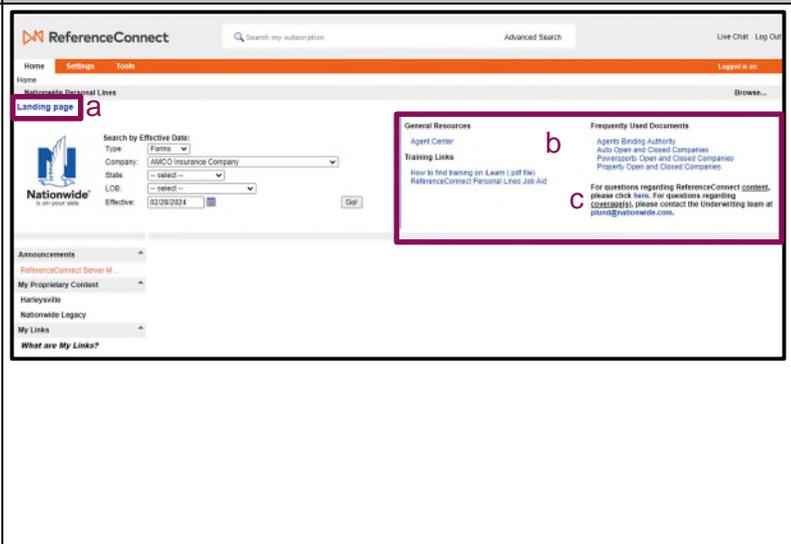
| Action | Screen |
|---|--------|
| <p>After selecting Reference Connect, you will typically be taken to the Landing Page.</p> <p>Note: If you already have Reference Connect open, you may be directed to the Home Page instead of the Landing Page.</p> <p>From the Landing Page, select “Personal Lines”.</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”); (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.

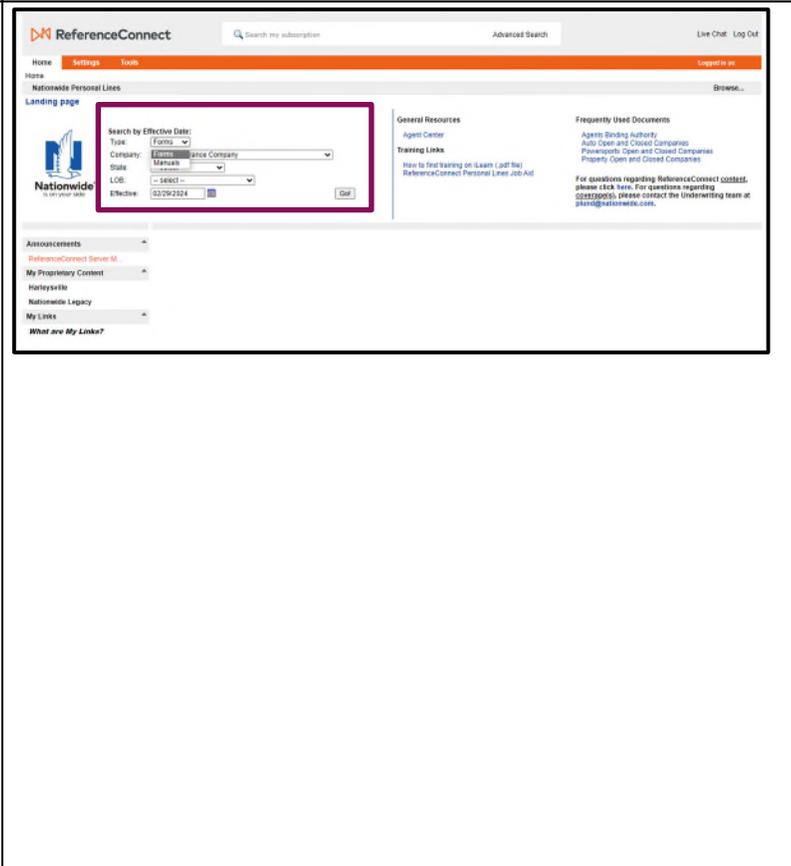
Access Reference Connect (cont'd)

Step 3

| Action | Screen |
|--|--|
| <p>The Personal Lines Home Page displays.</p> <ol style="list-style-type: none"> At any time, you can return to the Landing Page to change the product line simply by selecting Landing Page in the upper left corner. The Home Page includes a section of resources and links. Pay special attention to the Open and Closed Companies links under "Frequently Used Documents". These are especially helpful as they provide charts which identify the open and closed companies in each state. Note the contact information for any questions. |  |

Search by Effective Date

Step 1

| Action | Screen |
|--|---|
| <p>There are several search methods in Reference Connect. The "Search by Effective Date:" defaults on the landing page.</p> <p>For example, let's search for Indiana's homeowners policy written in the Nationwide Mutual Insurance Company.</p> <p>There are five filters to help refine your search.</p> <ol style="list-style-type: none"> To determine whether to search by "Manuals" or "Forms": <ul style="list-style-type: none"> "Manuals" have company guidelines and state specific information. "Forms" have policy/contract details. Since we're searching for a policy, select "Forms". "Company" – the policy we're searching for is in the Nationwide Mutual Insurance Company. Select that company in the dropdown listing. "State" – select the state. In this case it's Indiana. "LOB (Line of Business)" – select the appropriate line of business, which is "Homeowner". "Effective" date – will default to the current date. You can change the date by selecting the calendar icon. <p>Once all information is entered, select the "Go!" button.</p> |  |

Search by Effective Date (cont'd)

Step 2

Action

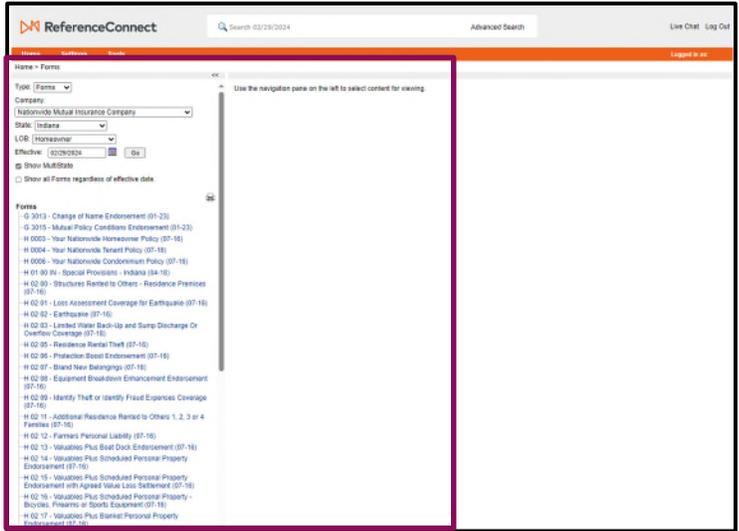
All the documents that meet your search criteria are displayed. From the list, locate the Homeowners Policy.

Note: If you have a question specific to Nationwide's Homeowner Policy, you would want to select "Manuals", instead of "Forms", to look at the underwriting guidelines.

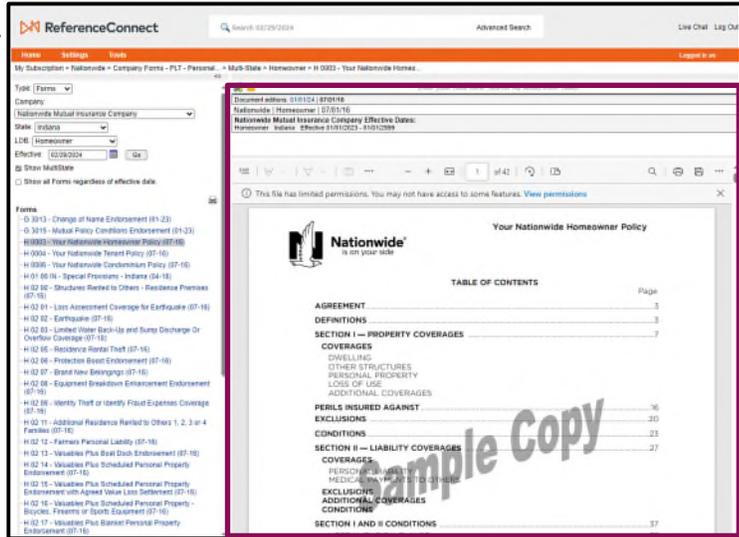
There are a couple of ways you can view "Your Nationwide Homeowner Policy" form.

1. Select the form in the results panel and it will appear in the current window to the right of the list. Please be aware that if you navigate away from this window or conduct another search, the document will not be retained, and you will need to search again to view it.
2. The other option is to open the document in a new browser tab or window. To do this, simply right-click on the highlighted form and select the option to open in a new tab or window. The exact wording of these options may vary depending on the browser you are using, but most browsers have one or both options.

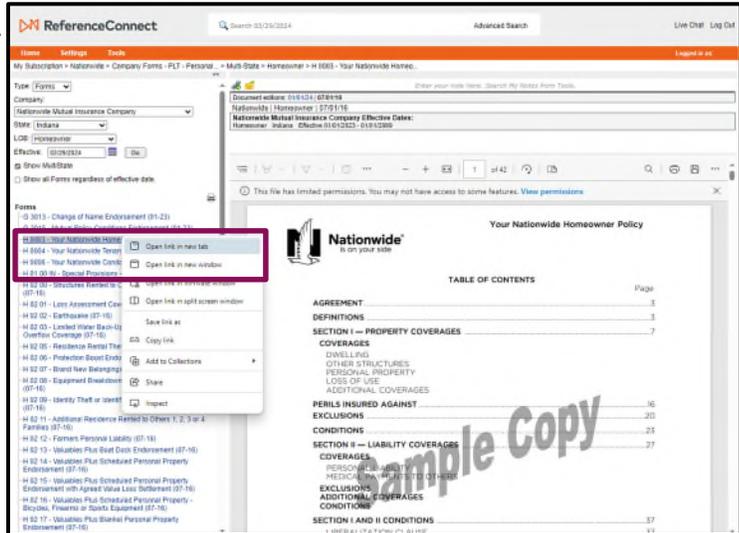
Screen



1.



2.



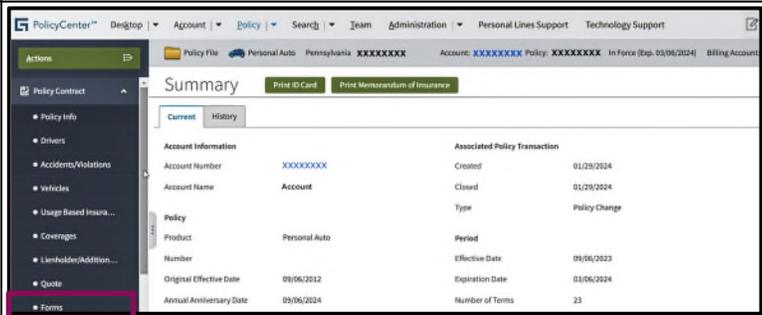
Find Contract Form Numbers and Documents in PolicyCenter

Step 1

Action

A simple way to see contract form numbers for a policy is to select PolicyCenter's "Forms" tab.

Screen



Step 2

Action

Every contract form that is on the policy displays.

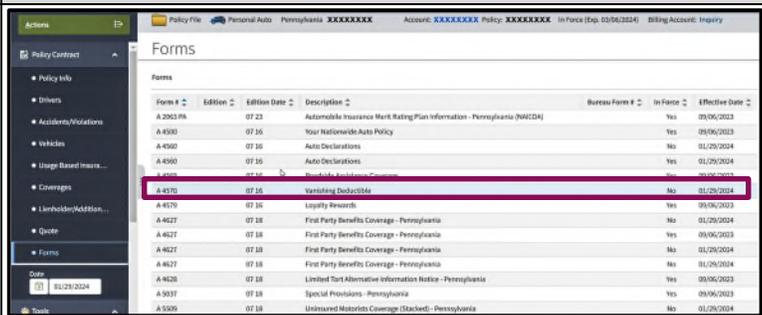
For example, if you want to search the contract language for the policy's "Vanishing Deductible" coverage, note the "Form #" and "Edition Date".

With this information, proceed to the next search type in Reference Connect, "Search by Form Number or Key Words"

OR

You can look for the document in PolicyCenter's "Documents" tab by following Step 3 below.

Screen



Step 3

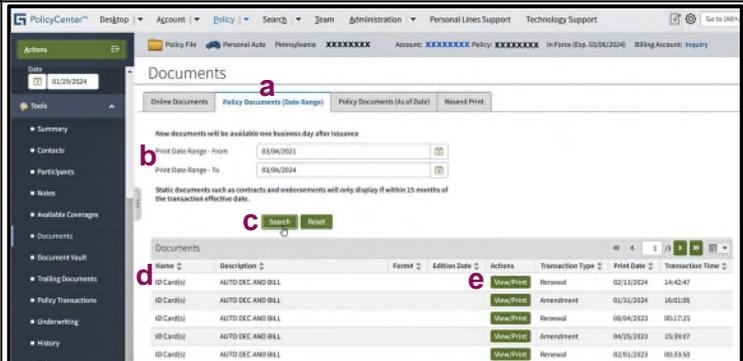
Action

Some policy documents are available under the "Documents" tab in PolicyCenter.

- Select "Policy Documents (Date Range)".
- Select a date range, if needed.
- Select the "Search" button.
- Documents such as policy declarations, billing notices and additional documents display.
- Select the "View/Print" button on the specific document(s) you want to view and/or print.

Note: Not all documents will display here. You can search for any form in Reference Connect as demonstrated in this job aid.

Screen



Search by Form Number or Key Words

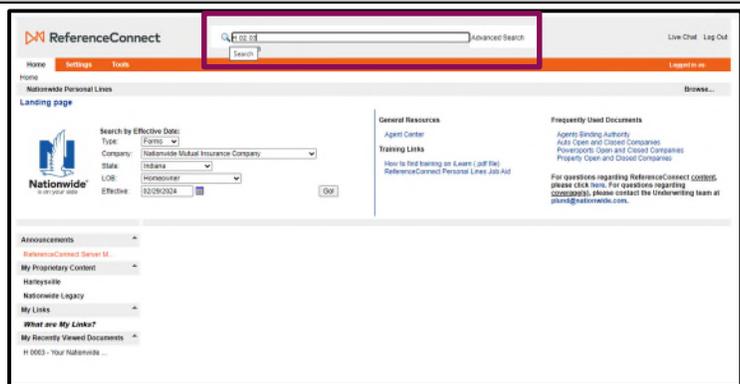
Step 1

Action

You can also search for a specific form number or keywords.

Simply enter your search criteria in the “Advanced Search” field at the top of the page and select the magnifying glass or press the “Enter” key.

Screen



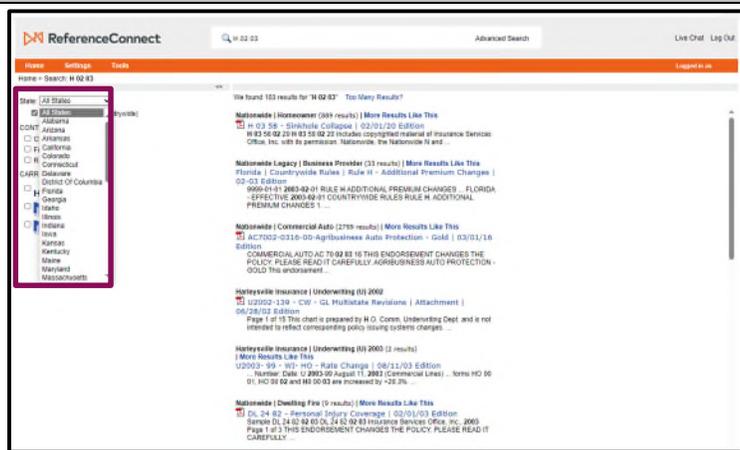
Step 2

Action

The search results display. You may narrow your search results using the options in the left-hand panel.

You can open your desired document the same way as before.

Screen



Search Using Browse

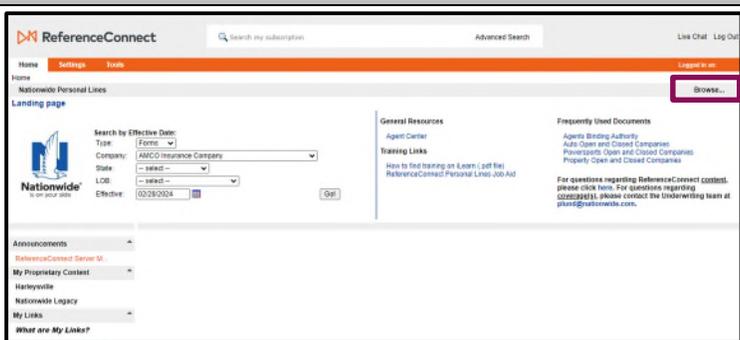
Step 1

Action

The third search method in Reference Connect is to utilize the browse option.

Select “Browse...” from the Home Page.

Screen



Search Using Browse (cont'd)

Step 2

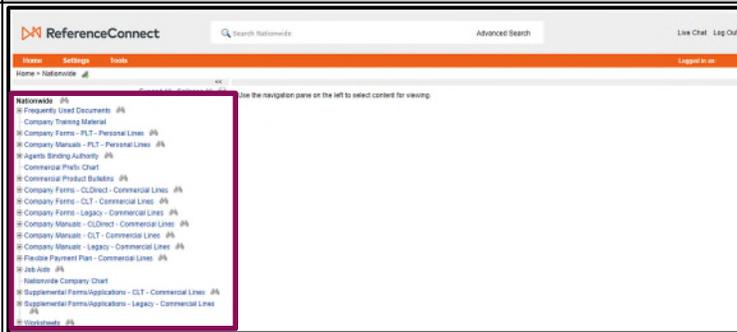
Action

The list of available forms and manuals will be loaded in the left panel of your screen.

To access a document, simply select each item or the + signs to open your options, allowing you to drill down to the desired information.

Note: Selecting the binoculars icon  will do the same thing.

Screen

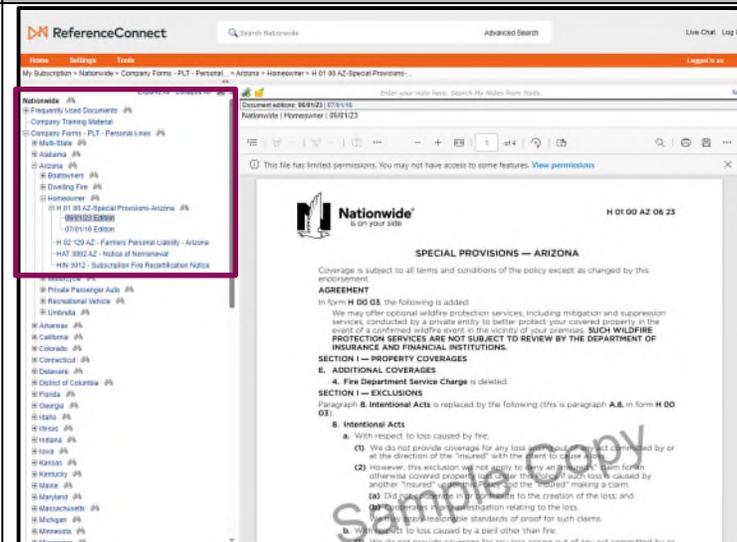


Step 3

Action

For example, to view the Arizona Homeowners Special Provisions, select and drill-down on the list until you locate it.

Screen



Access Recently Viewed Documents

Action

If you need to access any recently viewed documents, there is no need to perform the search again. Look under "My Recently Viewed Documents" on the Landing page and select the previously viewed document you need.

Screen

