

PolicyCenter Quick Start Guide for Agents



Description:

This job aid provides high-level information about the Personal Lines PolicyCenter system, including How you will launch to PolicyCenter from Agent Center and Comparative Raters. Additionally, it includes a list of general questions and answers about PolicyCenter. The document also provides options for further training and support.

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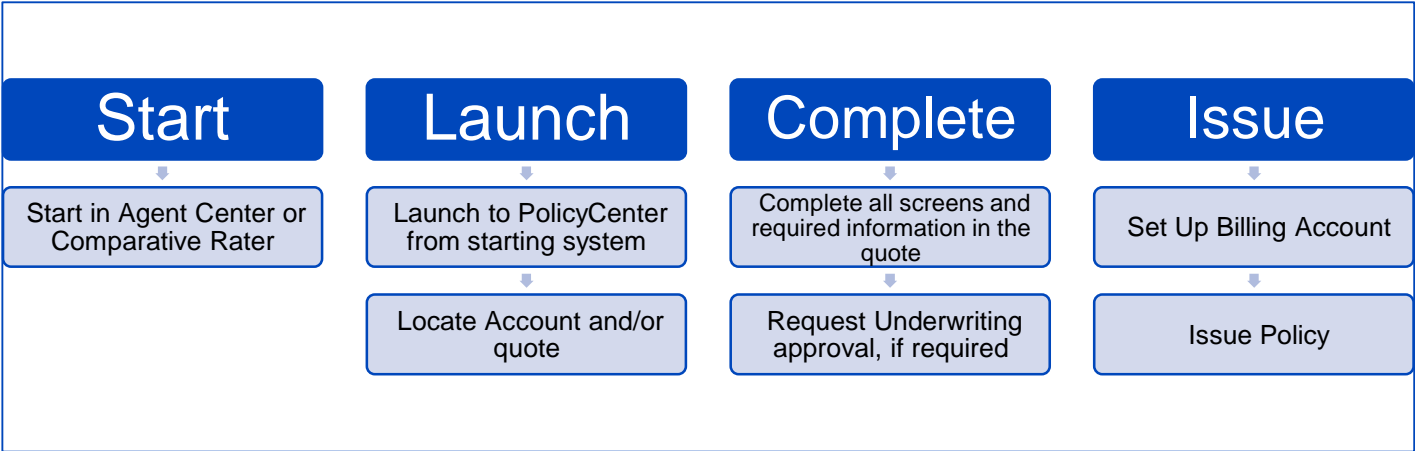
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PolicyCenter New Business Process Flow:

The process flow below provides the high-level steps needed to create a policy in PolicyCenter.



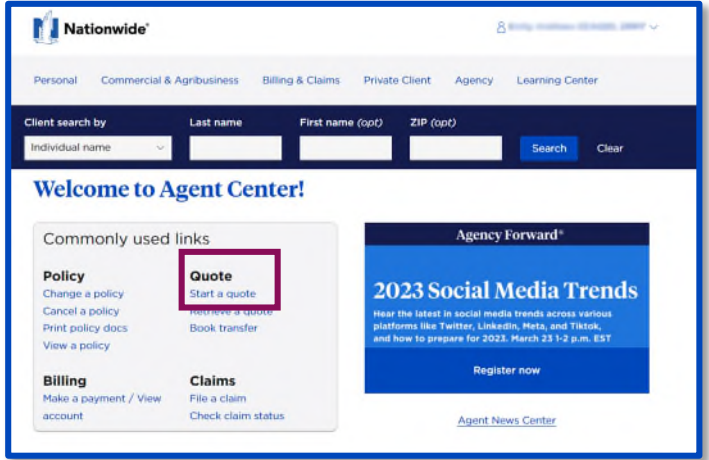
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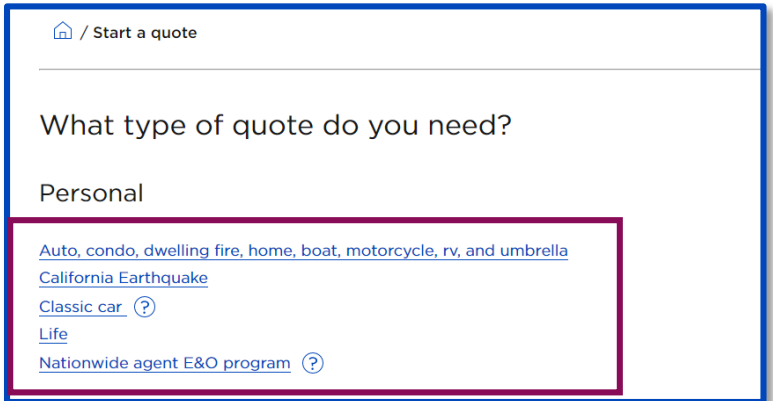
Launching from Agent Center:

This section provides the steps to link you from Agent Center to PolicyCenter when working with a potential new member. For additional information, refer to the PolicyCenter – Agent Center Cross-Reference Guide.

Step 1

Action	Screen
<p>To ensure the policy is written on the correct company and in the correct system, start on the Agent Center Home screen.</p> <ul style="list-style-type: none">Select the Start a Quote link in the Quote section in Commonly used links.	

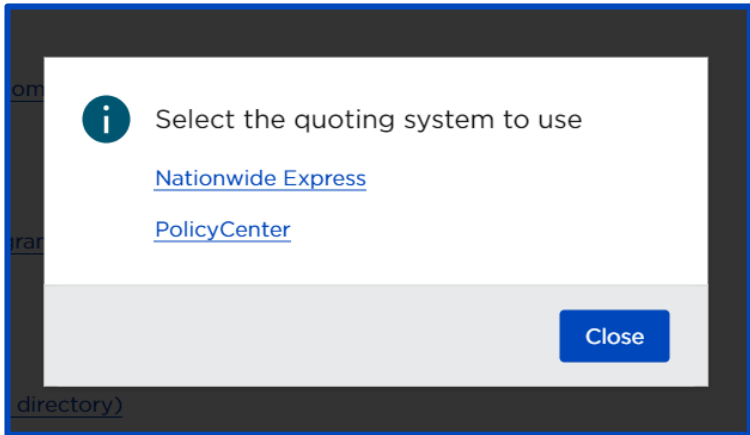
Step 2

Action	Screen
<p>On the Start a Quote screen:</p> <ul style="list-style-type: none">Select the type of quote needed.	

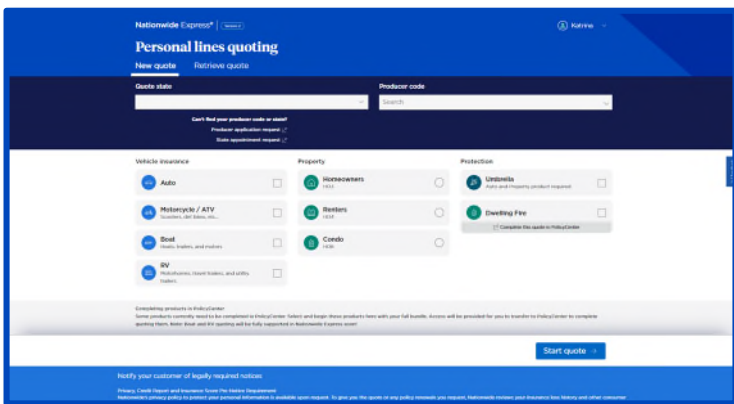


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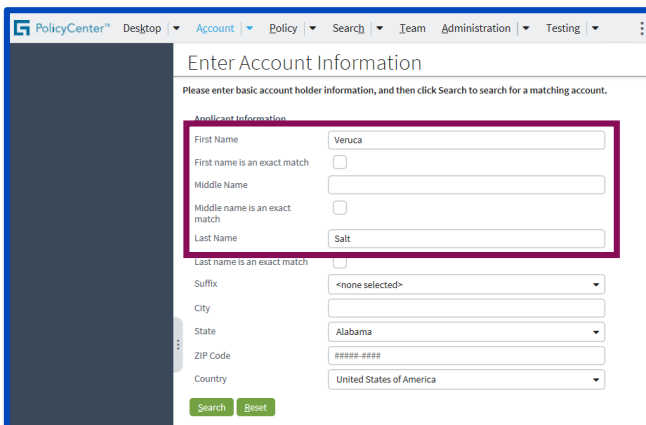
Step 3

Action	Screen
<p>Select the quoting system to use.</p> <p>Consider starting all quotes for new customers in Nationwide Express. Beginning in Nationwide Express will create an account in PolicyCenter, and all customer data will migrate to PolicyCenter.</p>	

Step 4

Action	Screen
<p>Select your Quote state and Producer code from the drop-down options. Select the products to be included in the quote and Start Quote to begin entering customer information.</p>	

Step 5

Action	Screen
<p>On the <i>Enter Account Information</i> screen:</p> <p>Enter the member's First Name and Last Name in the appropriate fields.</p> <p>Select the <u>S</u>earch button.</p>	



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Step 6

Action

On the *Enter Account Information* screen in PolicyCenter:

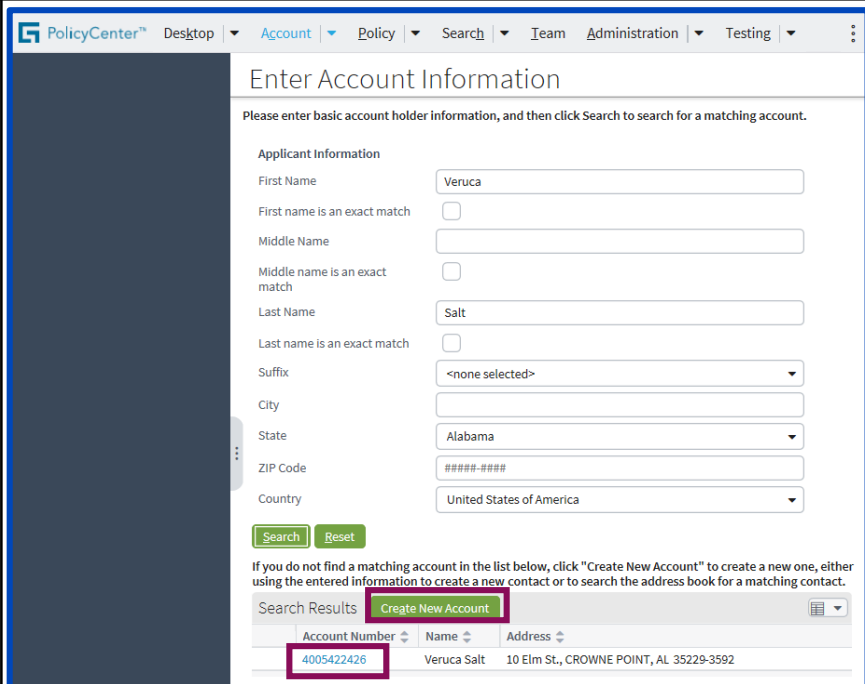
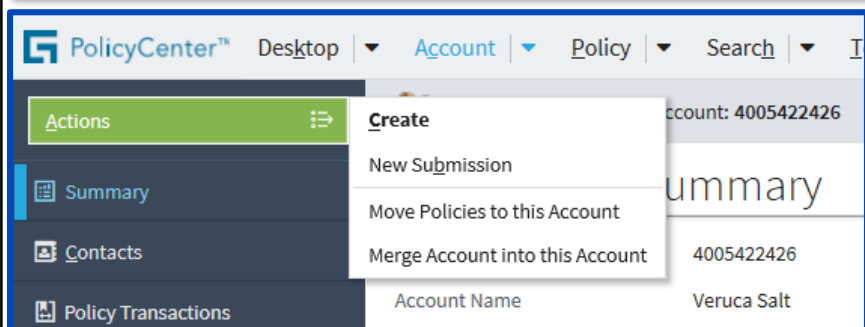
If a PolicyCenter account does not exist:

- **Select** the **Create New Account** button and complete the client information in PolicyCenter to create an account.
- After creating the account, start a new quote from the *Account Summary* screen.

If a PolicyCenter account exists:

- **Select** the account link in the *Search Results* section and start a new quote from the *Account Summary* screen.
- **Select** the **Actions** button and select **New Submission**.

Screen


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Step 6

Action

On the *Enter Account Information* screen in PolicyCenter:

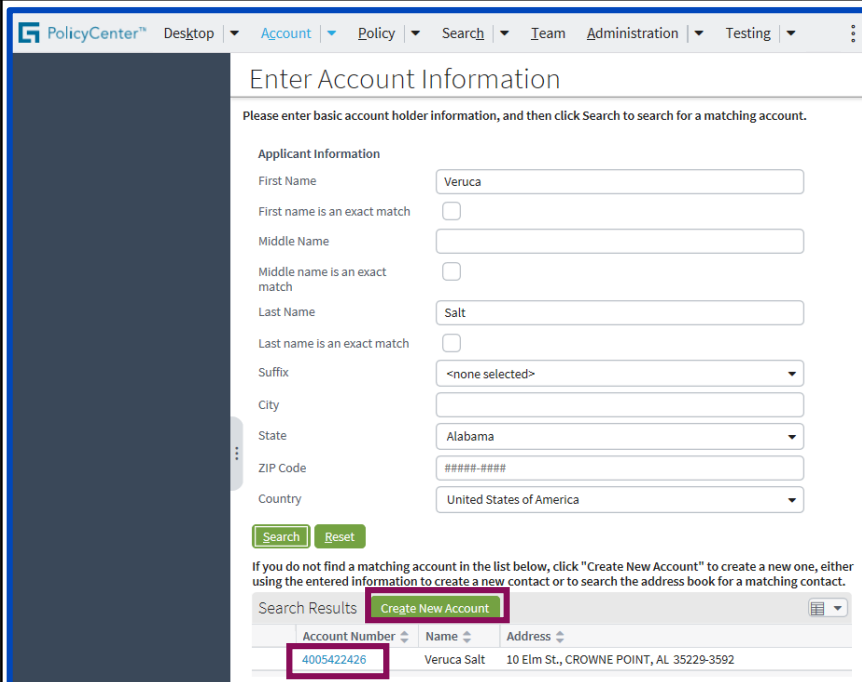
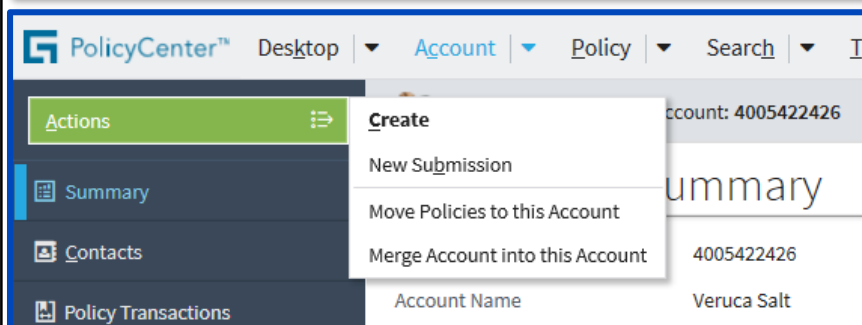
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If a PolicyCenter account exists:

- **Select** the account link in the *Search Results* section and start a new quote from the *Account Summary* screen.
- **Select** the **Actions** button and select **New Submission**.

Screen


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Launching from a Comparative Rater:

This section describes the process to launch from a Comparative Rater to PolicyCenter. The chart below describes where you will land in PolicyCenter, depending on the Comparative Rater used and type of policy.

Rater	Auto	Property	Note
EZLynx* <ul style="list-style-type: none">Quote Access Select HERE link	Deep launch to PolicyCenter <i>Policy Info</i> screen	Deep launch to PolicyCenter <i>Qualification</i> screen	Agent must log in to PolicyCenter with NW credentials.
EZLynx* <ul style="list-style-type: none">Using NW logo	Launches to Agent Center	Launches to Agent Center	Agent must log in to Agent Center with NW credentials, enter quote information in Agent Center, then search for quote in PolicyCenter.
PLR	Deep launch to PolicyCenter <i>Policy Info</i> screen	Deep launch to PolicyCenter <i>Qualification</i> screen	DO NOT have to login to Agent Center.
ITC	Deep launch to PolicyCenter <i>Policy Info</i> screen	Deep launch to PolicyCenter <i>Qualification</i> screen	Agent must log in to PolicyCenter with NW credentials.
Applied	Deep launch to PolicyCenter <i>Policy Info</i> screen	Deep launch to PolicyCenter <i>Qualification</i> screen	DO NOT have to login to Agent Center.
IBQ	Deep launch to PolicyCenter <i>Policy Info</i> screen	Deep launch to PolicyCenter <i>Qualification</i> screen	Agent must log in to Agent Center with NW credentials.



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Additional Comp Rater Information:

Producer Code Confirmation

It may be necessary to confirm the Producer Code when launching in to PolicyCenter. The following system message displays if the Producer Code three-digit suffix is 000: *“Producer Code should be reviewed to guarantee correct assignment of new business.”*

To confirm the correct Producer Code is assigned to the policy, review the Producer Code assigned in the *Producer of Record* section. The correct Producer Code can be selected from the drop-down menu, if the Agent is licensed and appointed in the selected rate state.



Producer of Record

Organization 130010258 PC Agency Training producer #42

Agency Code 00026217

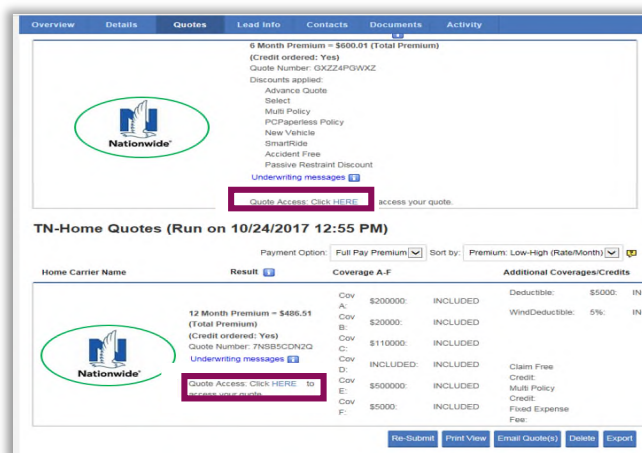
Producer Code 00026217 - 000 None Selected

Service Plus

Additional EZLynx Information

To deep launch into PolicyCenter from the EZLynx Comparative Rater, select the link(s) outlined in red in the image below.

If the Nationwide logo is selected from the EZLynx Comparative Rater (outlined in green in the image below), you will be launched into Agent Center. You will be required to go through the quote process in Agent Center before you are launched to PolicyCenter.



Overview Details Quotes Lead Info Contacts Documents Activity

6 Month Premium = \$600.01 (Total Premium)
(Credit ordered: Yes)
Quote Number: GXZZ4PGWXXZ
Discounts applied:
Advance Quote
Select
Multi Policy
PCPaperless Policy
New Vehicle
SmartRide
Accident Free
Passive Restraint Discount
Underwriting messages [\[i\]](#)
Quote Access, Click HERE to access your quote.

TN-Home Quotes (Run on 10/24/2017 12:55 PM)

Payment Option: Full Pay Premium Sort by: Premium: Low-High (Rate/Month)

Home Carrier Name	Result	Coverage A-F	Additional Coverages/Credits
Nationwide	12 Month Premium = \$486.51 (Total Premium) (Credit ordered: Yes) Quote Number: 7NSB5CONZQ Underwriting messages [i]	Cov A: \$200000 INCLUDED	Deductible: \$5000 INC
		Cov B: \$20000 INCLUDED	WindDeductible: 5% INC
		Cov C: \$110000 INCLUDED	
		Cov D: INCLUDED INCLUDED	Claim Free Credit: Multi Policy
		Cov E: \$500000 INCLUDED	Credit: Fixed Expense Fee
		Cov F: \$5000 INCLUDED	

Quote Access, Click HERE to access your quote.

Re-Submit Print View Email Quote(s) Delete Export

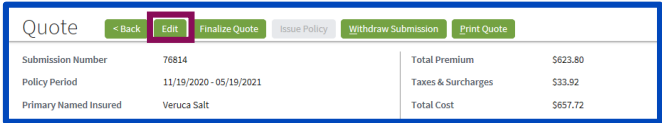
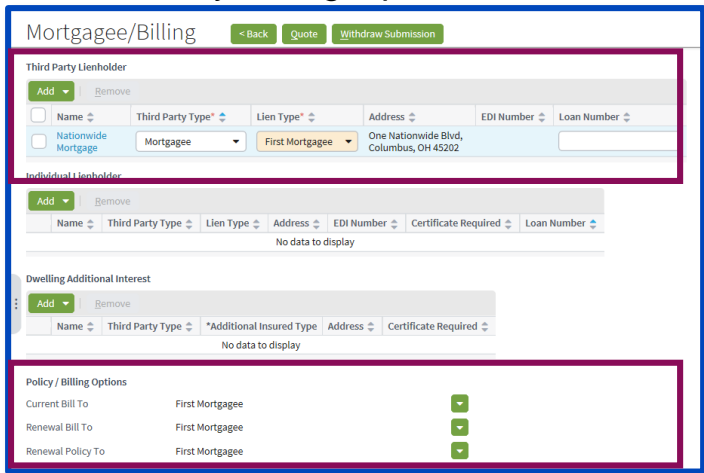


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Frequently Asked Questions:

Below is a list of frequently-asked questions and answers about PolicyCenter.

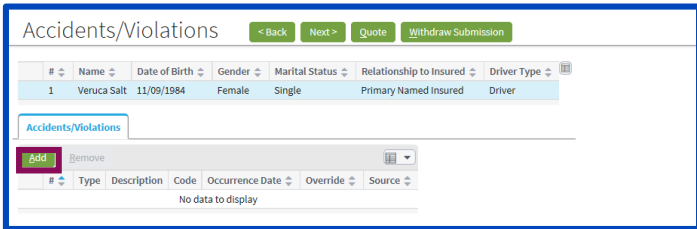
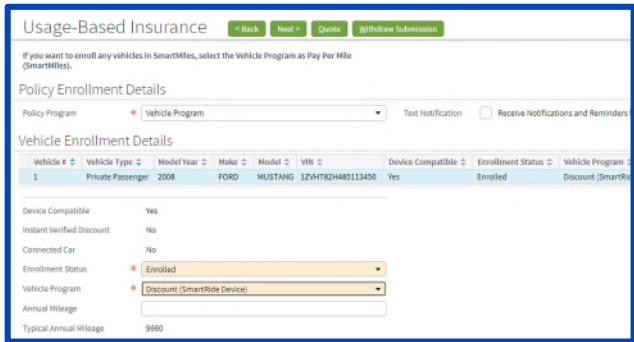
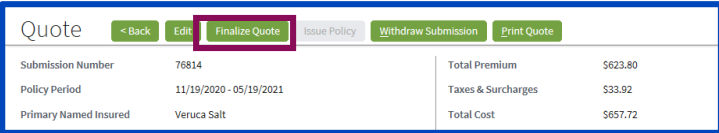
Question	Answer
Is it possible to edit a new submission (quote) before it is bound?	<ul style="list-style-type: none"> Yes. After quoting you must edit a submission to make any additional changes. From any screen, Select the Edit button to begin the editing process.  <ul style="list-style-type: none"> Refer to the Edit a Submission/Policy Transaction job aid for additional information.
Where do I add mortgage information on a Property policy?	<ul style="list-style-type: none"> Mortgage information is added on the Mortgagee/Billing screen. Mortgage information is added in the Third-Party Lienholder section. Updates to Billing Options are made in the Policy/Billing Options section.  <p>Note: Refer to the Add Mortgagee (Third Party) job aid for the full steps to add a Mortgage to a policy.</p>



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Frequently Asked Questions (continued):

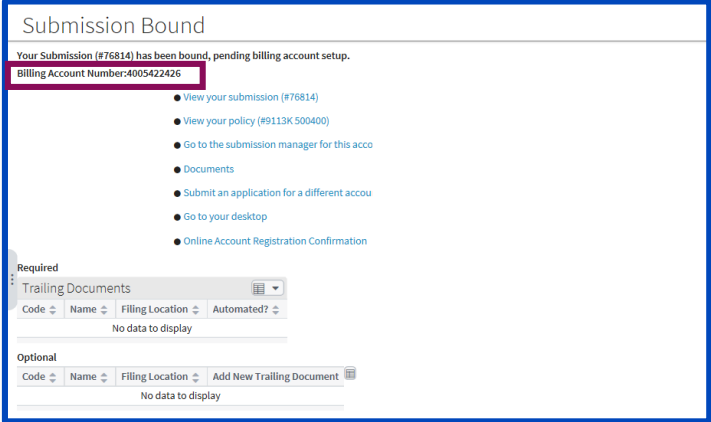
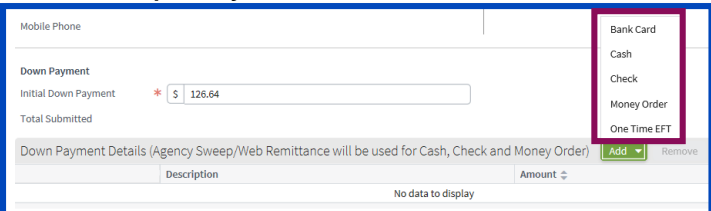
Question	Answer
How do I add Accidents or Violations to an Auto policy?	<ul style="list-style-type: none"> Accidents and Violations are added on the <i>Accidents/Violations</i> screen of an Auto policy. Select the Add button to create a new item. 
Where do I select Smart Ride?	<ul style="list-style-type: none"> Smart Ride is added on the Usage-Based Insurance screen on an Auto policy.  <ul style="list-style-type: none"> Refer to the How to enter Usage-Based Insurance Information job aid for additional information.
When is the MVR ordered in PolicyCenter?	<ul style="list-style-type: none"> MVR is ordered after the submission is quoted, but before the policy is issued, by selecting the Finalize Quote button. The Finalize Quote button does not activate until the submission has been quoted. 



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Frequently Asked Questions (continued):

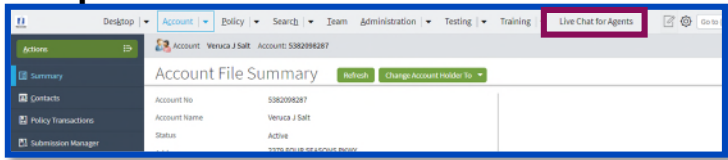
Question	Answer
<p>How do I find Billing Account information?</p>	<ul style="list-style-type: none"> • The Billing Account number displays on the Submission Bound screen on a new policy during the bind process. • For an existing Billing Account, account information can be viewed in Agent Center. 
<p>How do I apply multi-source payments to a down payment?</p>	<ul style="list-style-type: none"> • For the down payment of a new submission, the payment may be from multiple sources, such as: Bank Card, Cash, Check, Money Order, or One Time EFT. You may have up to four sources for the payment. Select the type of payment and amount for your account for the entire down payment. • Refer to the Multi Source Payments job aid for step-by-step instructions for applying multiple sources of payment on a policy. 



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Training and Support:

Question	Answer
Who can I contact for on-demand training help?	<ul style="list-style-type: none"> Nationwide Virtual Assistant is available via the Personal Lines Support link in the tab bar of the PolicyCenter screen. Basic questions and answers are programmed into the Virtual Assistant. Training Connection is a Live Chat service with a Nationwide Service Center Trainer. The Training Connection is best utilized for help the Virtual Assistant cannot answer. You will be offered to connect with Training Connection after the Virtual Assistant fails to answer your question twice. Training Connection hours are Monday – Friday 9:30 a.m. to 7:30 p.m. EST 
Where can I find PolicyCenter training materials?	<ul style="list-style-type: none"> Fugent – Self-paced PolicyCenter eLearning courses, job aids, and Learning Snacks are available on Fugent. Access a list of all available Personal Lines PolicyCenter eLearning courses here.

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.

