

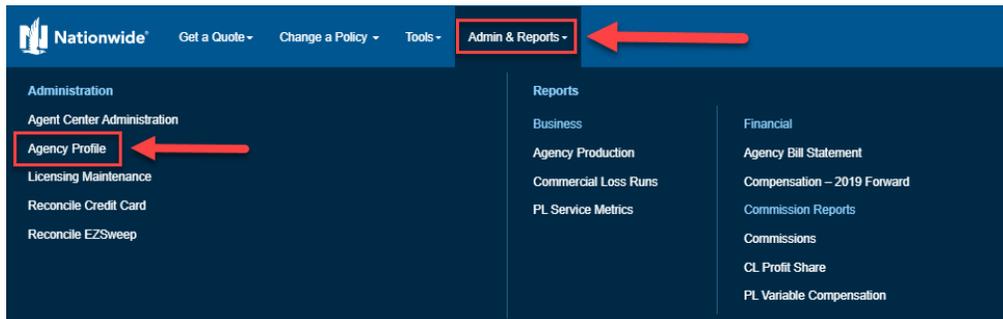


Instructions for Nationwide Insurance download registration

In addition to configuring the agencies IVANS account in the agency management system, download preferences and settings need to be recorded at Nationwide so that policy activity and other transactions can be transmitted properly.

Note: ONLY Agent Center Agency Administrators have access to the following pages. If the agency is unsure who is listed as an Agency Administrator or needs to add, or update access the agency should contact the Nationwide Help Desk (1-888-667-3866).

- In a web browser log in to <https://agentcenter.nationwide.com/> and choose the “Admin & Reports” menu and in the “Administration” section click on the “Agency Profile” link:



- The “Agency Profile” page will be displayed. Select an agency from the “Preferences” section and click the “Download Preferences” button in the “Profile Details” > “Preferences” section:

Agency Profile

Preferences

Agency Number

Profile Details

General Information Last Modified: 05/02/2000

*Phone Fax Website

*Agency Email Agency Locator Email

Preferences

*CL Account/Policy Email

Informational Emails Opt-out Actionable Emails (non required) Opt-out

By selecting to Opt-out of email notifications, you will no longer receive some of the notifications. All notifications can be viewed on Agent Center.

CL Refund Opt-in

By selecting to Opt-in for the CL Refund check, all commercial/firm refund checks will be sent directly to your agency. Uncheck the Opt-in checkbox to have the refund check sent directly to the insured.

Note: If you have other changes needed for your agency, please contact your Sales Manager.

- The “Welcome to Download Preferences” page will be displayed.
- In the “Agency Information” section, select an agency from the “Agency” drop down list. Validate and/or update “Contact Name”, “Contact Phone Number”, “Contact Email Address” fields.
 - New set ups choose a “Download Start Date”.
 - Updates to existing download preferences the “Download Start Date” does not need to be updated.
 - To stop ALL daily downloads, enter a date in the “Download Cancel Date field”.

Note: This process should be completed for all agency codes.

Welcome to Download Preferences | Print Close

Nationwide

Welcome to Download Preferences Help

Please contact your vendor or reference the help link at the top of this page for the Vendor Availability table for a list of the products, lines of business, billing, claims and eDocument features.

Reminder: all NAIC codes and unique coverage codes need to be entered into your management system before we can send the first download.

- The NAIC codes can be found through the help link at the top of this page under the topic "Vendor, NAIC Codes, and Ivans Information".
- For assistance entering those codes, please contact your management system support.
- For specific questions about download with Nationwide, please email download@nationwide.com.

Agency Information ←

Agency

*Contact Name

*Contact Phone Number

*Contact Email Address

*Download Start Date (no weekends or holidays)

Download Cancel Date (no weekends or holidays)

- New set ups; Within the “Management System Information” section, select the “Management System” & “Product” the agency contracted with. Existing set ups; If the agency is switching agency management systems, update the “Management System” & “Product” fields (will impact download types selections and may require them to be updated).
- Provide the agency’s IVANS account information (Y Account, User ID & IBM Machine Address).

Note: An IVANS account is required to set up carrier downloads. If an IVANS account is needed, contact the Nationwide Help Desk (1-888-667-3866) and provide agency name/address/phone number, agency contact name/email/phone and which agency management system the agency contracted with.

- New set ups; click the “Create Partner Download” button.

Management System Information

*Management System

*Product

*IBM Machine Address

*Ivans Y Account Number

*Ivans Userid

Preference Options

Reset Create Partner Download

- Existing set ups; click the “Update Download” button.

Reset Update Download

- In the “**Preference Options**” section, select the appropriate drop-down option from each of the available download types.

Note: Download type options in this section are dynamic based on the agency management system selected. Not all agency management systems are certified for all Nationwide download types. Those download types that have been certified will show in this section.

- Click the “**Update Download**” button to save the selected settings. Click “**Reset**” to change all download types back to their default option.

The screenshot shows a web interface titled "Preference Options". It contains 14 dropdown menus arranged in two columns. The left column includes: *Personal Downloads (No), *Commercial Auto (No), *General Liability (No), *Commercial Umbrella (No), *Claims Download (None), *Documents Declarations (None), and *California Earthquake Authority (No). The right column includes: *Commercial Downloads (No), *Commercial BOP (No), *Commercial Property (No), *Workers Compensation (No), *Commissions Download (None), and *Messages Billing Alerts (None). At the bottom right, there are two buttons: "Reset" and "Update Download". A red arrow points to the "Update Download" button.

- Once completed the Agency Administrator will be provided a success message at the top of the “**Welcome to Download Preferences**” page.