# Grant Producer Access Using Agent Center

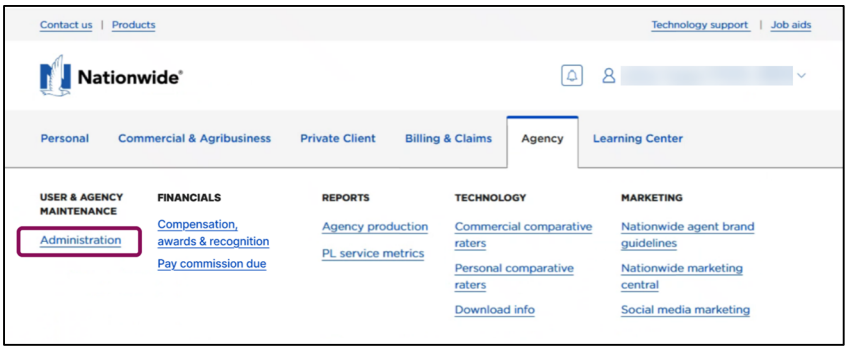
## Description

This job aid provides step-by-step guidance for agency administrators on how to grant producer access using Agent Center Workspace. This process is essential for enabling new producers to write business with Nationwide.

If you are onboarding a new individual who has not yet been set up with licensing or Agent Center access, your first step is to add them as a new user. Please refer to the Add or Edit Users in Agent Center job aid for instructions on how to complete this step.

Once the new user has been added, follow the instructions below to grant them producer access. This ensures they have the necessary permissions to begin writing new business under your agency.

## Step 1

| Action | Screen |
| --- | --- |
| • Within Agent Center, select the Agency tab.<br>• Under the User & Agency Maintenance section, select Administration. |  |

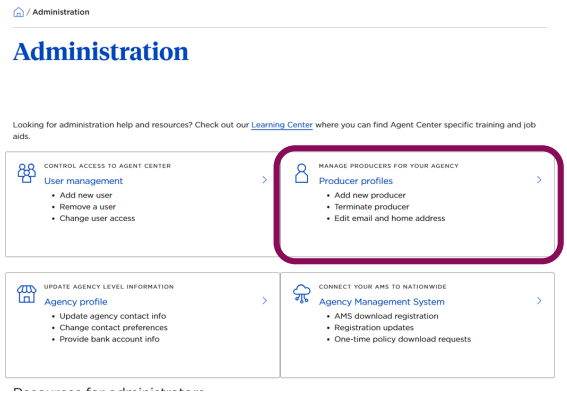


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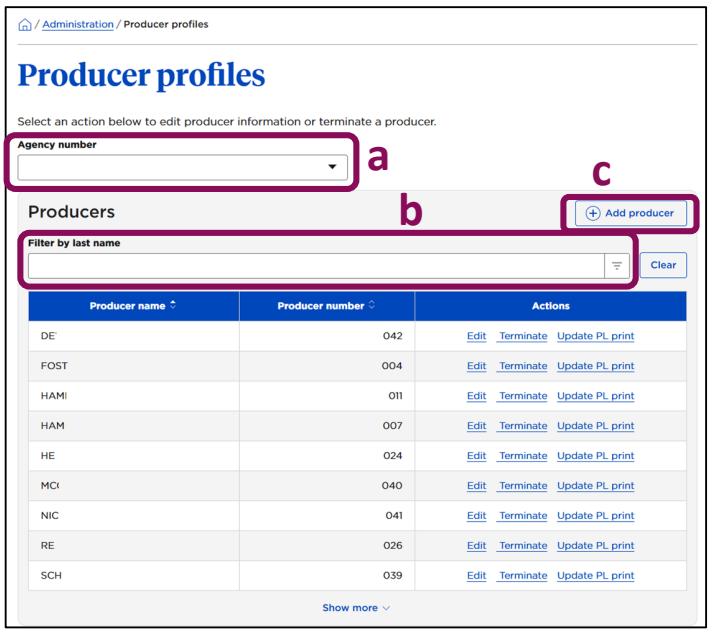
# Grant Producer Access Using Agent Center

## Step 2

| Action | Screen |
|---|---|
| From the Administration main page, select **Producer profiles**. |  |



## Step 3

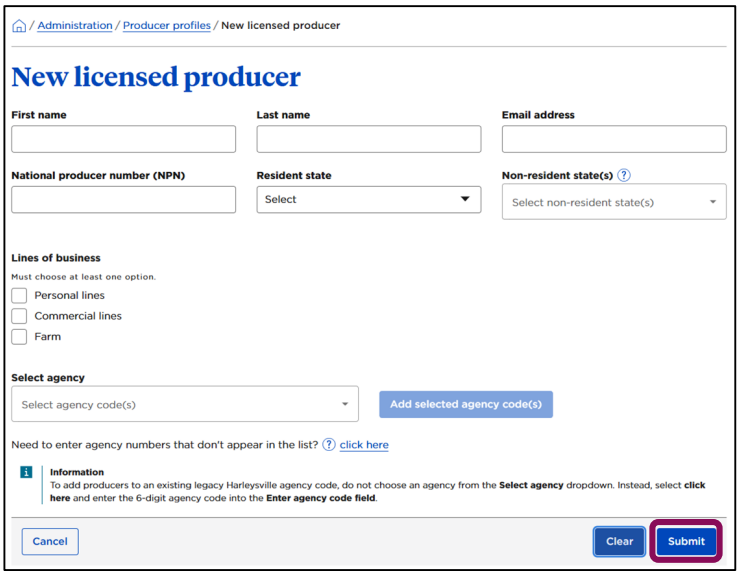
| Action | Screen |
|---|---|
| a. If your agency has multiple codes, use the **Agency Number** drop-down menu to select the correct code that the new producer will operate under. This ensures the producer is aligned with the appropriate business entity for writing new business.<br>b. If you are updating an existing producer's access, you can quickly locate their profile by filtering using their last name.<br>c. To add a new licensed producer, select the **Add producer** button. |  |



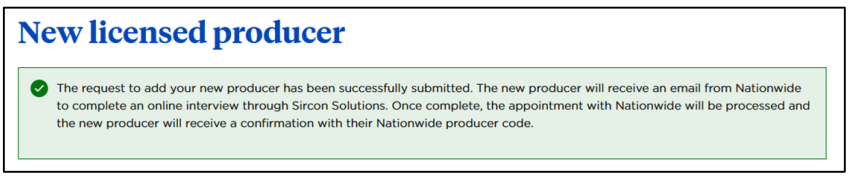
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# Grant Producer Access Using Agent Center

## Step 4

| Action | Screen |
|---|---|
| On the **New Licensed Producer** screen:<br>• Fill out all required information for the new producer.<br>• Select **at least one line of business** the producer will be working with.<br>• Choose the appropriate **agency codes**. If your agency operates under multiple codes, you may select all that apply.<br><br>Once all fields are completed, select the **Submit** button to finalize the setup. |  |

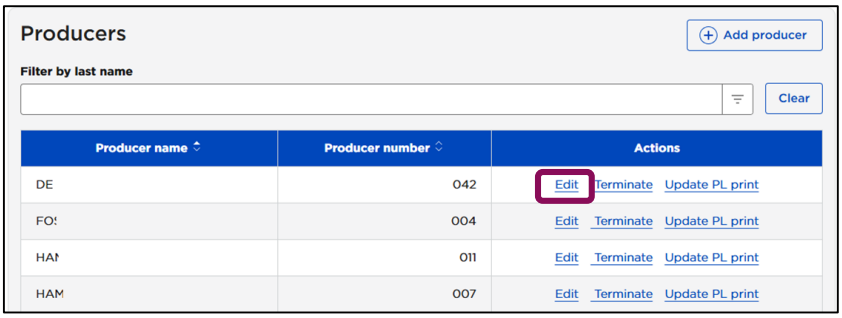
## Step 5

| Action | Screen |
|---|---|
| • After submitting the new producer setup, a **confirmation message** will appear. This message will include **additional steps** that the new producer must complete to finalize their access and begin writing business.<br><br>• Be sure to communicate these next steps to the producer so they can complete their onboarding process without delay. |  |

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# Grant Producer Access Using Agent Center

## Step 6

| Action | Screen |
|---|---|
| **Edit a Producer profile:**<br><br>To update an existing producer's information or access, locate their name and select Edit under the Actions column. This allows you to make necessary changes without re-entering all the details. |  |

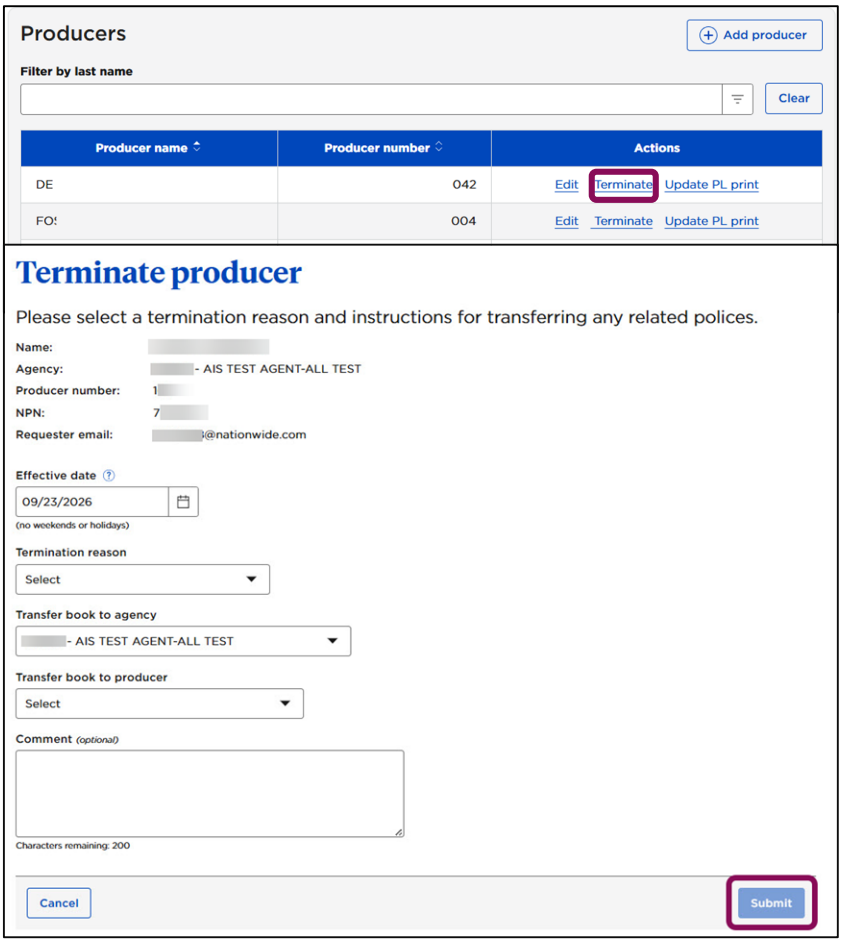
## Step 6a

| Action | Screen |
|---|---|
| From the **Edit Producer Information** screen:<br>• Make any necessary updates to the producer's details.<br>• Review the **additional information at the top of the screen**, as it may include further steps required to complete the update.<br>Once all changes are made, select the **Submit** button to save your updates. |  |

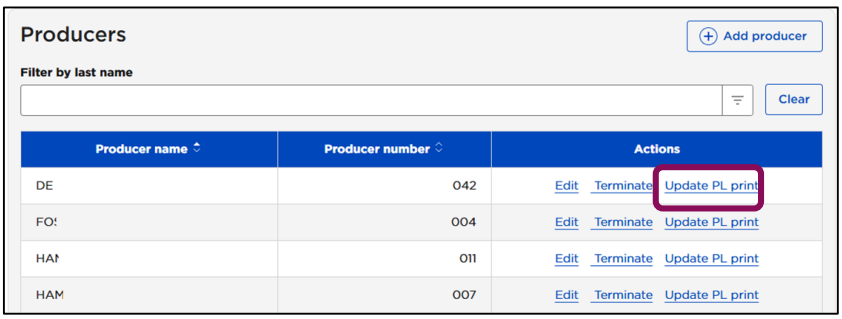
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# Grant Producer Access Using Agent Center

## Step 6b

| Action | Screen |
|---|---|
| **Terminate producer**<br><br>To remove a producer from your agency:<br>• Navigate to the **Terminate Producer** screen.<br>• Select a **termination reason** from the available options.<br>• Indicate who will be taking over any of the terminated producer's **related policies**.<br>• If needed, provide any **additional instructions** in the **Comment** section to clarify the termination or reassignment process.<br><br>Completing this step helps maintain accurate records and ensures proper policy reassignment.<br><br>• Once all changes are made, select the **Submit** button to save your updates.<br><br>**IMPORTANT NOTE: If you are the admin of only one agency, you will not see the "Transfer book to agency" field.** |  |

## Step 6c

| | |
|---|---|
| **Update PL print** – this link will take you to the producer settings in PolicyCenter. This feature allows the producer or agency administrator to:<br>• Add or update the producer's email address and phone number.<br>• Ensure the correct contact information appears on Personal Lines policy documents sent to the insured.<br>• Keeping this information current helps maintain professional communication and ensures policyholders receive accurate contact details. |  |

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