Manage Producers in Your Agency
Agent Center

Description

This job aid reviews how to manage producers in your agency in Agent Center Workspace.

Select the link to advance to the desired procedure:

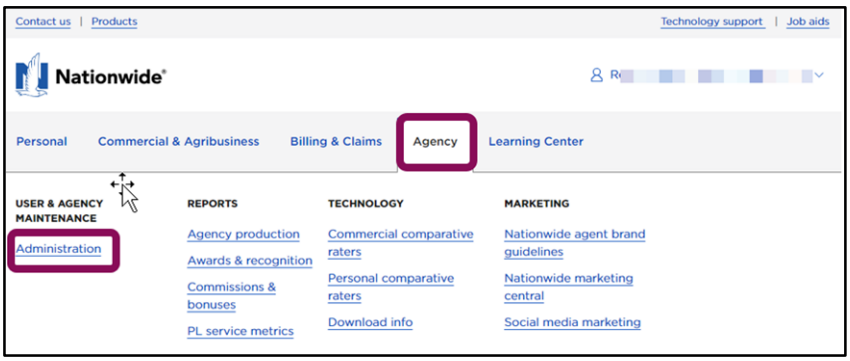
- Add a New Producer (Adds a licensed producer)
- Add a Non-resident Producer
- Grant a Producer Access (Gives producer access to Agent Center, PolicyCenter, as well as other assigned options)
- Terminate a Producer

Add a New Producer

Start with Part 1: Admin Actions (below) or go directly to Part 2: Producer Actions.

Part 1: Admin Actions

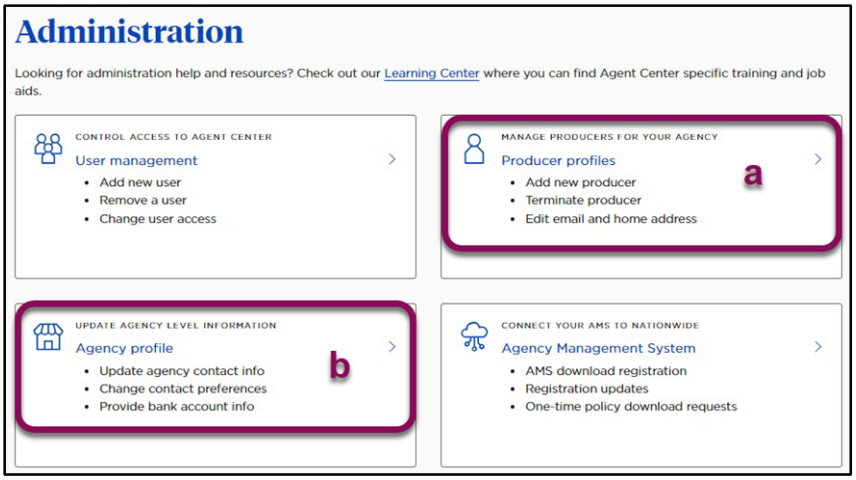
Step 1

Action	Screen
Within Agent Center, choose the **Agency** tab and select **Administration.**	

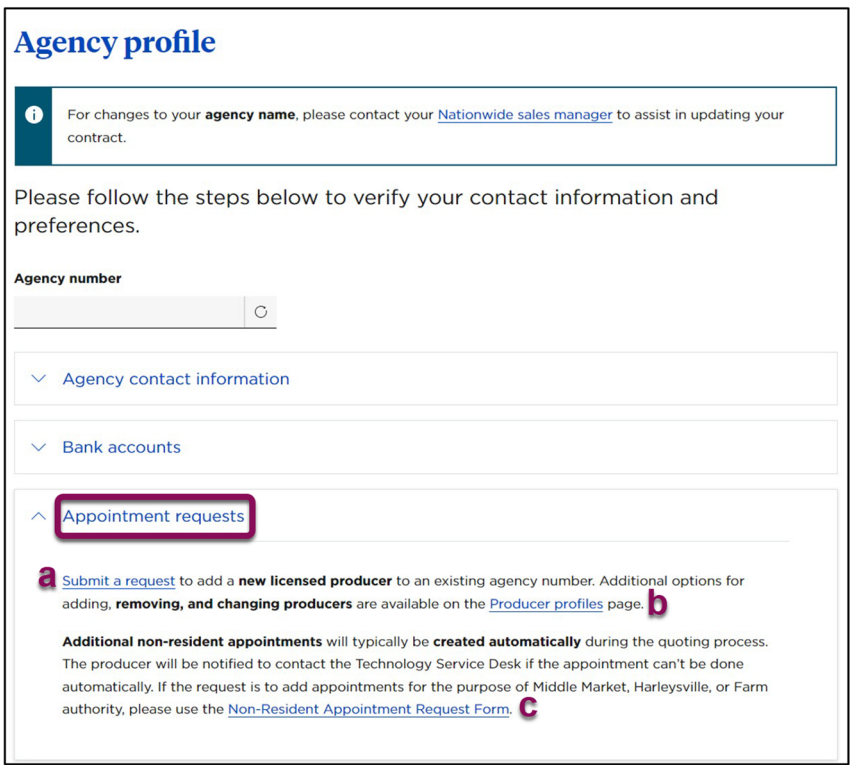
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(2) I agree that the information contained in this training presentation is confidential and proprietary to Nationwide and may not be disclosed or provided to third parties without Nationwide’s prior written consent.
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Add a New Producer: Part 1: Admin Actions, continued

Step 2

Action	Screen
In the **Administration** section, there are two ways to add a Producer. If you: a. Select "**Producer profiles**", you can skip the next step. b. Select "**Agency Profile**", continue to the next step.	

Step 3

Action	Screen
Within the **Appointment requests** section of **Agency profile**, you can: a. Use the **Submit a request** link to add a new licensed producer to an existing agency number. ***OR*** b. Link to the **Producer profiles** page to add, remove and change producers. c. Additional **non-resident appointments** will typically be **created automatically** during the quoting process. However, use the **Non-Resident Appointment Request Form** to add appointments for Middle Market, Harleysville or Farm authority.	

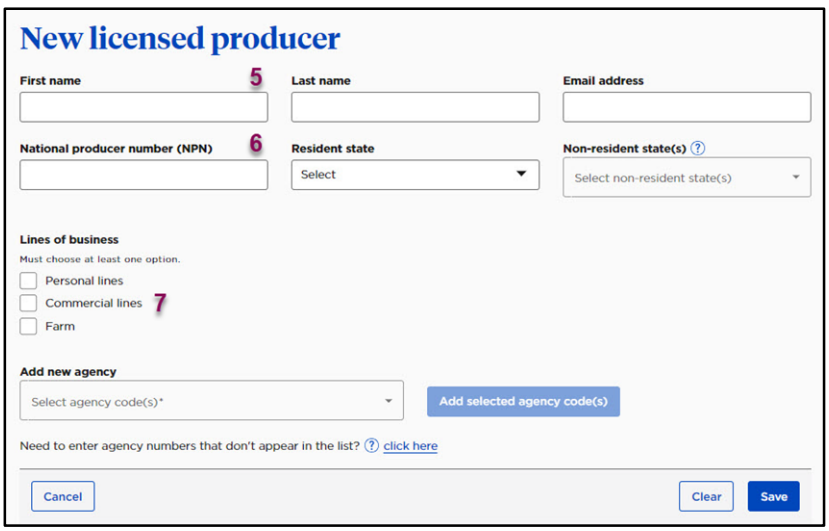
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Add a New Producer: Part 1: Admin Actions, continued

Step 4

Action	Screen
From **Producer profiles** you can: a. Add a producer by select the **Add producer** button. ***OR*** b. Find a producer by filtering by last name and selecting the **Filter** button. From the filtered list, select the appropriate action to take. The choices are: **Edit, Terminate** or **Update PL print** Proceed to the next step.	

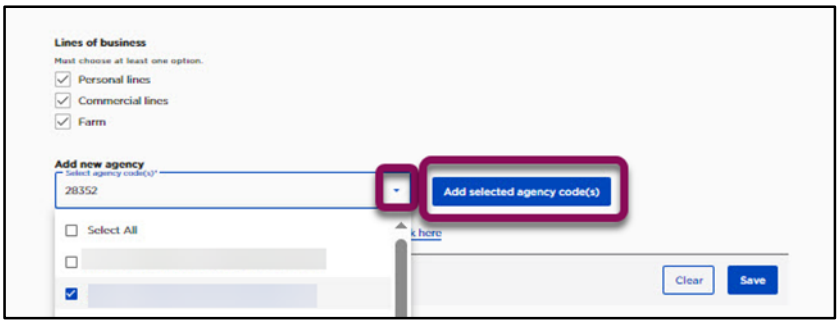
Steps 5 - 7

Action	Screen
You will add new producers using this process as well as update non-resident appointment requests. 5. Input all personal producer information 6. Select **Resident state** and **Non-resident state*** (if applicable). 7. Select **Lines of Business.**	

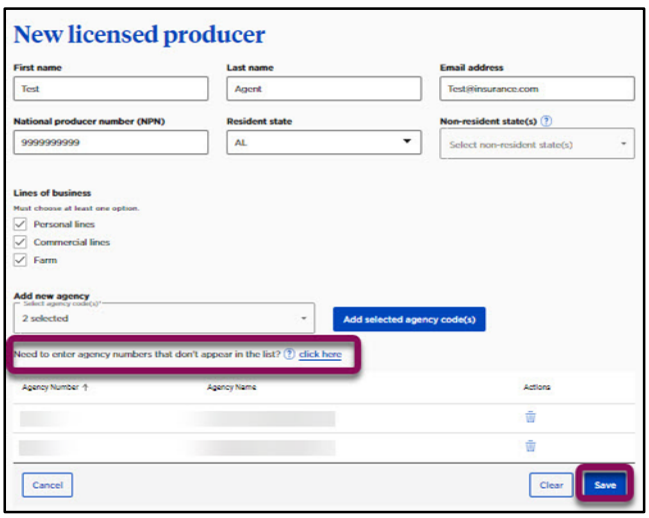
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Add a New Producer: Part 1: Admin Actions, continued

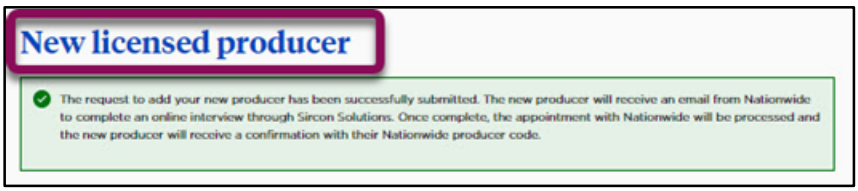
Step 8

Action	Screen
In the **Add new agency** section, select the **Select agency codes** drop-down arrow. Scroll to select all agency codes that the new producer will be added to. With all agency codes selected, select the **Add Selected Agency Codes** button.	

Step 9

Action	Screen
For agency codes that do not appear in the drop-down list, select the **Click here** link located next to the question icon. Select **Save.**	

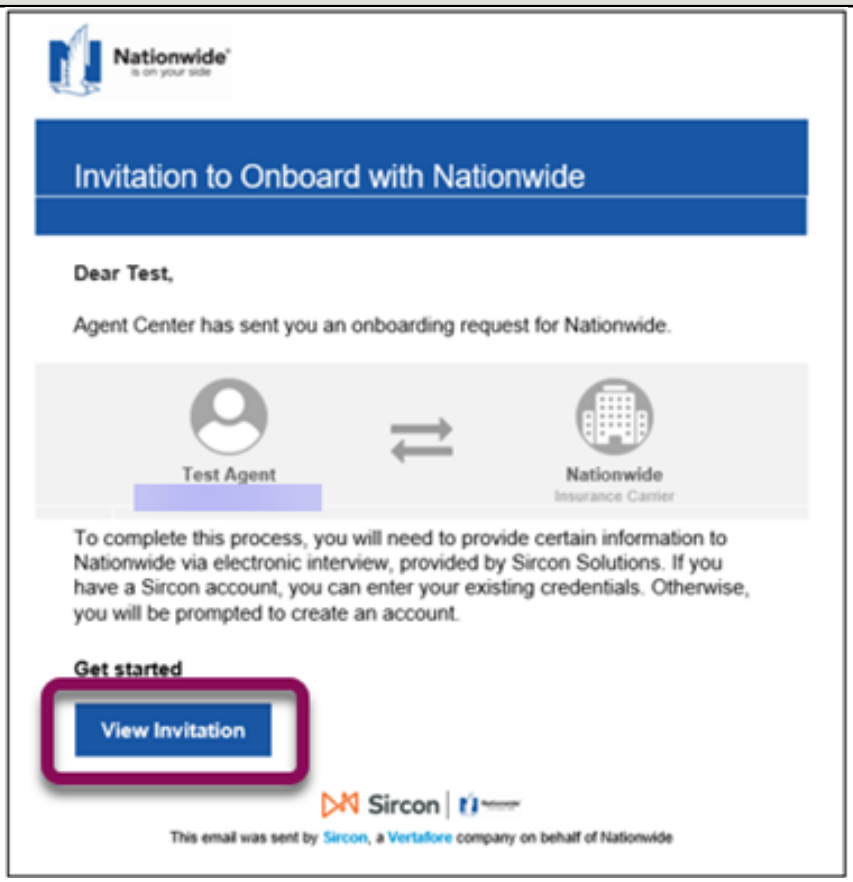
Step 10

Action	Screen
Note: A success screen will appear with a green check stating your submission was successful. The new producer will receive an email from Nationwide to complete an online interview through Sircon Solutions. Once complete, the appointment with Nationwide will be processed and the new producer will receive a confirmation with their Nationwide producer code. *Please share Part 2: Producer Actions of this document with your producer.*	

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Add a New Producer: Part 2: Producer Actions

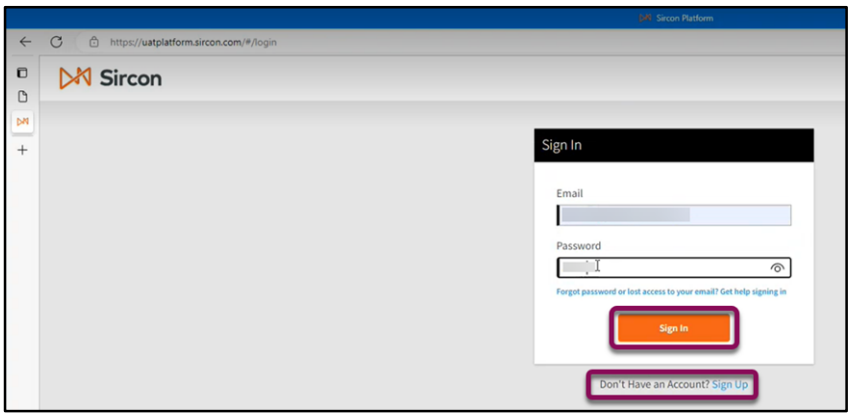
Step 1

Action	Screen
Producer will receive email from Nationwide to complete online interview through Sircon. Producer will select the **View Invitation** button to begin the online interview process.	

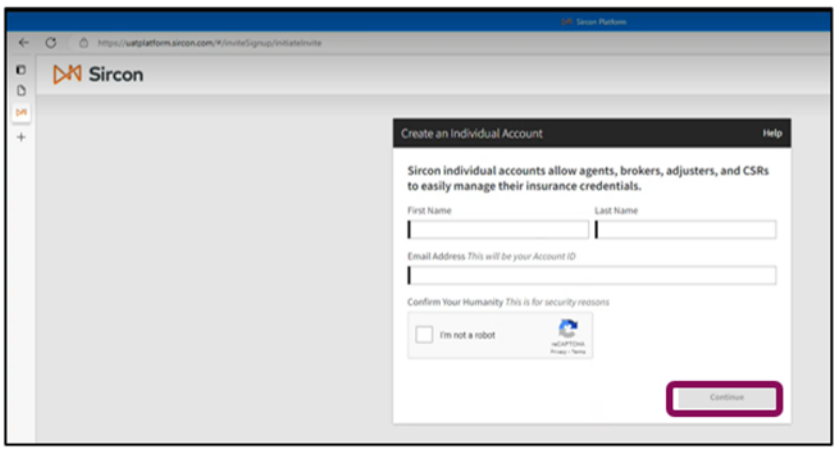
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Add a New Producer: Part 2: Producer Actions

Step 2

Action	Screen
Producer will need to sign into their Sircon account, using email and password. **If the producer does not have a Sircon account**, please select the “Sign Up” text link and proceed to **Step 3**. **If the producer already has a Sircon account**, go to **Step 4**.	

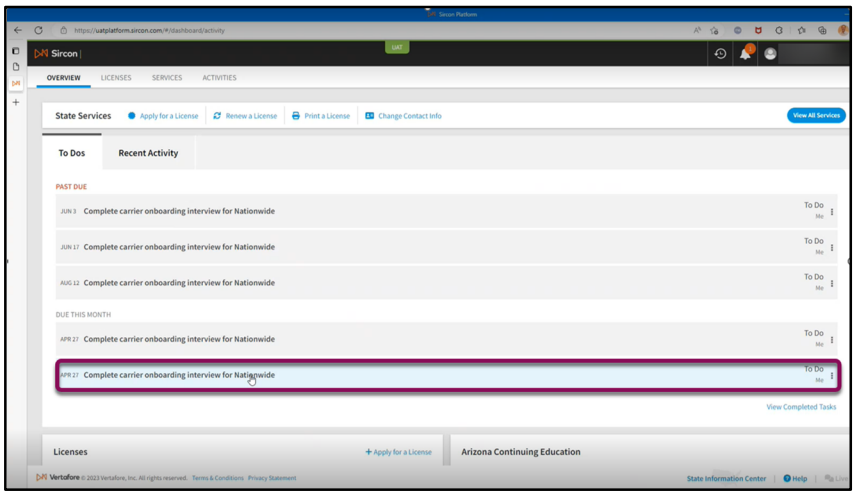
Step 3

Action	Screen
To create a Sircon account, enter **First** and **Last Name** and **Email address.** Select the **Continue** button.	

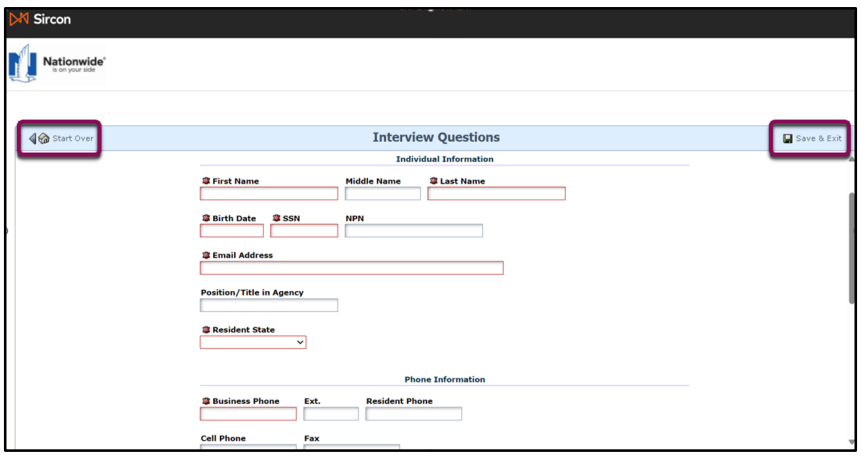
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Add a New Producer: Part 2: Producer Actions

Step 4

Action	Screen
In the **To Do** tab of the **Overview** screen, select **Complete carrier onboarding interview for Nationwide** to open the Interview Questions screen.	

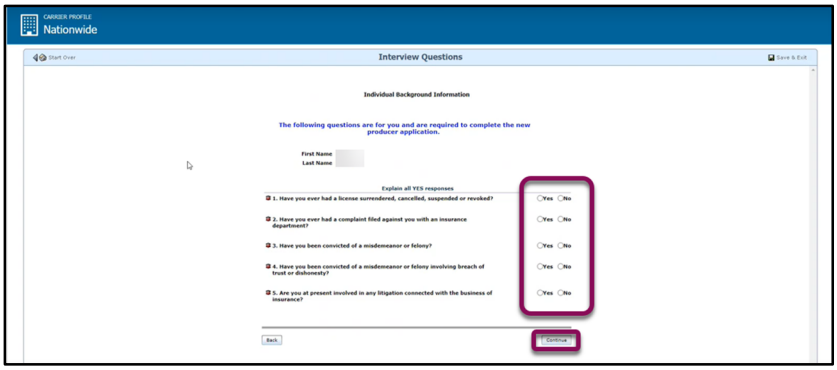
Step 5

Action	Screen
In the Interview Questions screen, proceed to input all Individual Information questions, selecting the **Continue** button until all questions have been asked. You may start over anytime using the **Start Over** button OR **Save and Exit** to return where you left off.	

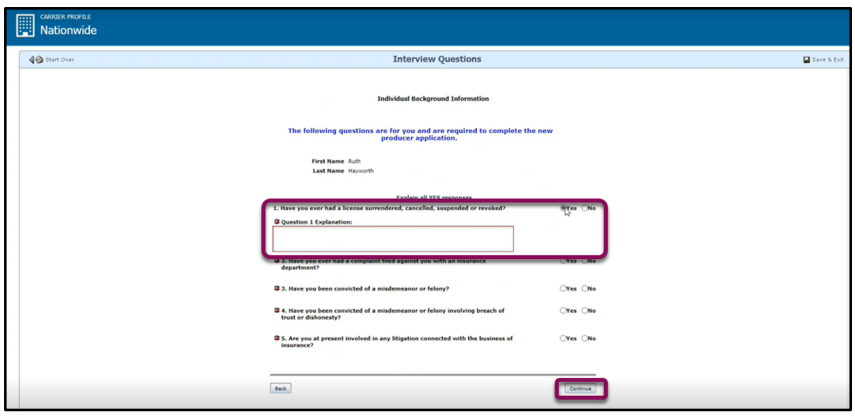
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Add a New Producer: Part 2: Producer Actions

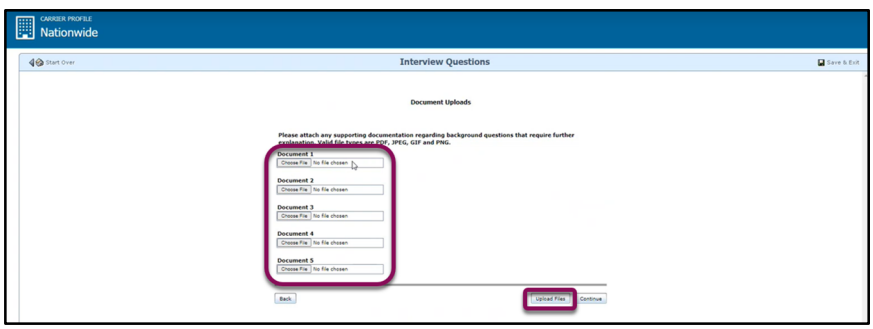
Step 6

Action	Screen
Answer background information questions by selecting **Yes** or **No** for each question. Then select **Continue.**	

Step 7

Action	Screen
If you answer **Yes** to any question, a box will open to explain the **Yes** response. Select **Continue** after responding to all questions.	

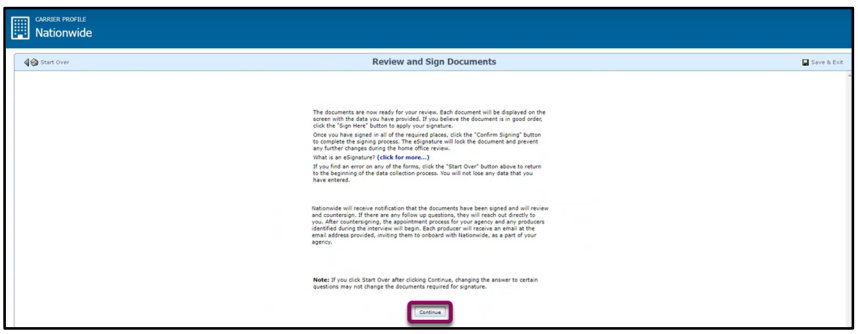
Step 8

Action	Screen
If documentation is required for further explanation to **Yes** questions, select the **Choose File** button to attach files. Select **Upload Files** after attaching all files. After all files have been uploaded, select **Continue.**	

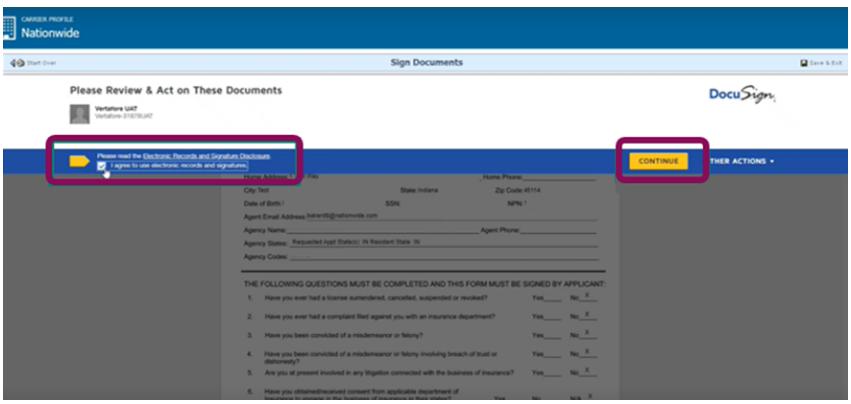
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Add a New Producer: Part 2: Producer Actions

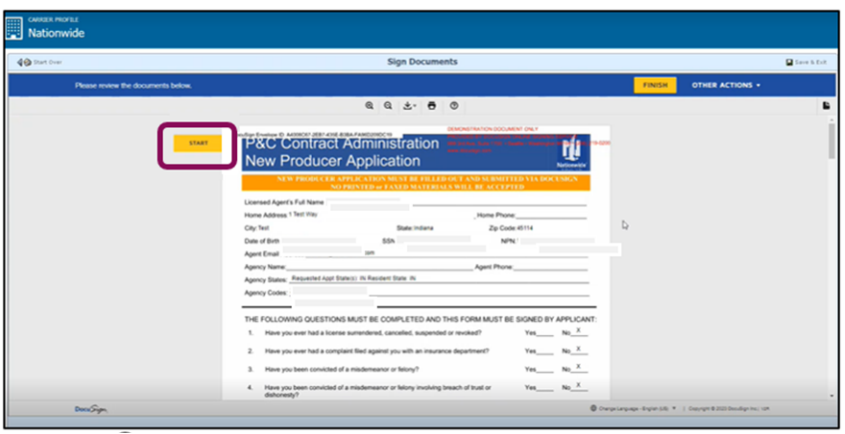
Step 9

Action	Screen
To review and electronically sign completed documents in DocuSign, select the **Continue** button.	

Step 10

Action	Screen
Select the check box to agree to use electronic records and signatures. Select **Continue** to review and sign documents.	

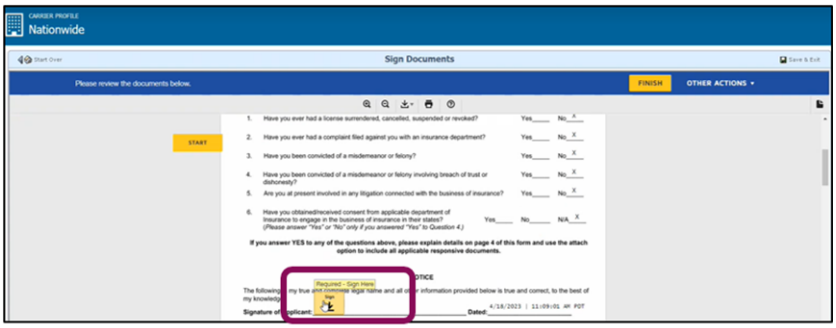
Step 11

Action	Screen
Select the **Start** button to review. ***Important Note: Agency Codes shown on the document only reflect those chosen from drop-down list. Any additional agency codes manually input by your agency will be reviewed and added by licensing support.***	

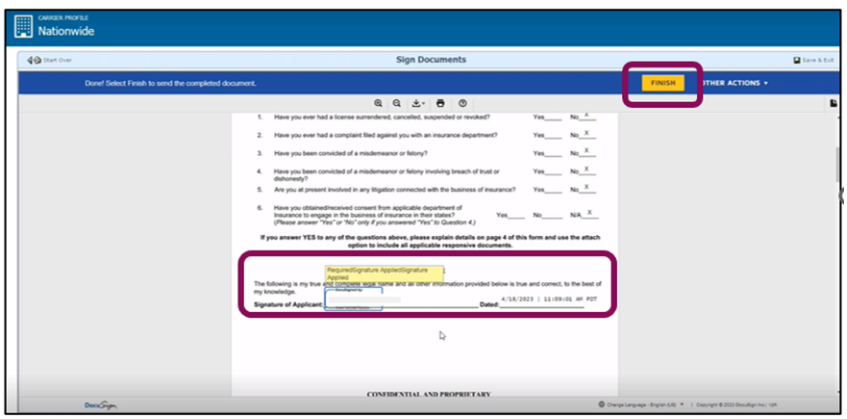
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Add a New Producer: Part 2: Producer Actions

Step 12

Action	Screen
Select **Sign** to confirm your name and adopt a signature style. A pop-up window will appear for you to select your style. Once you have selected your style, select **Adopt and Sign** to electronically sign the document.	 

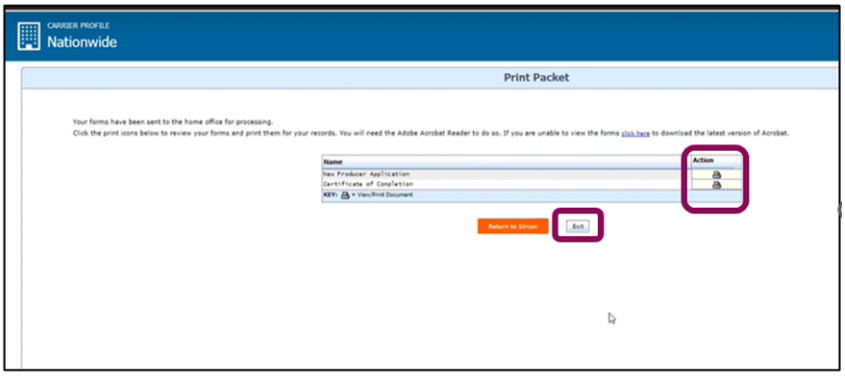
Step 13

Action	Screen
Review the signature and select **Finish** to complete the DocuSign process.	

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Add a New Producer: Part 2: Producer Actions

Step 14

Action	Screen
To print completed documents, select the printer icon next to each document. Select the **Exit** button when complete. This information will remain in your Sircon account. *Nationwide will send a confirmation email when your appointments have been completed.*	

Home

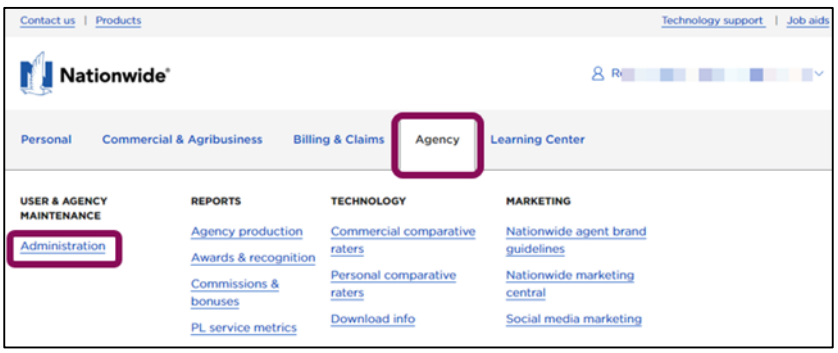
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Add a Non-resident Producer

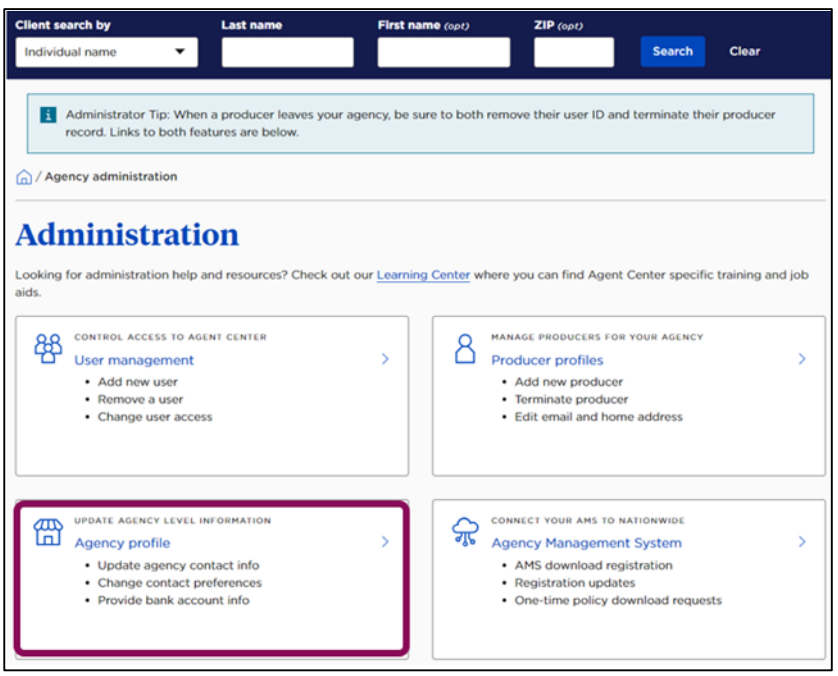
If you and the agency are licensed in your resident state and have a non-resident license in good standing in a different state, Licensing can add the non-resident appointment! The process usually takes 3-5 business days.

Note: **These actions can only be performed by an Agent Center Administrator**.

Step 1

Action	Screen
From Agent Center, choose the **Agency** tab and select **Administration**.	

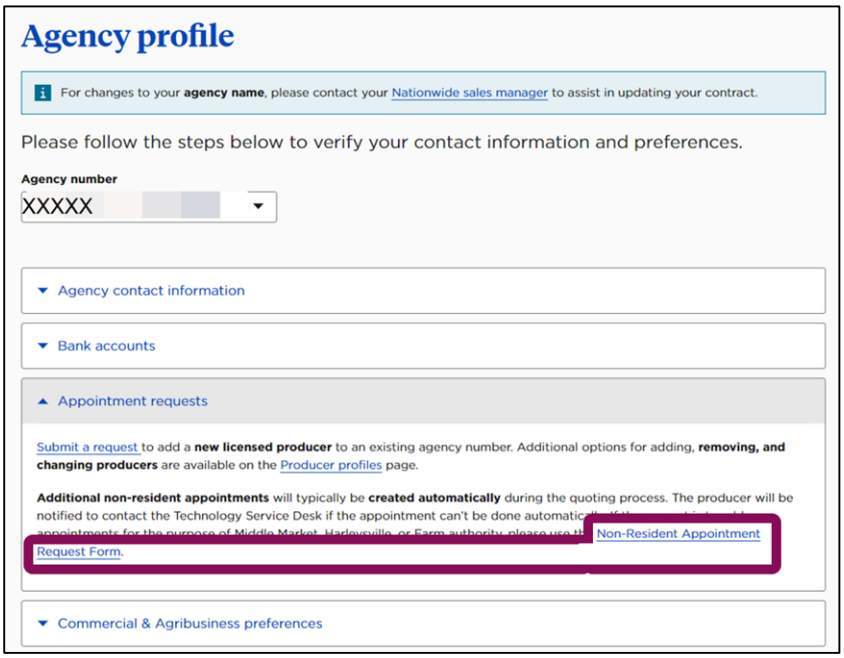
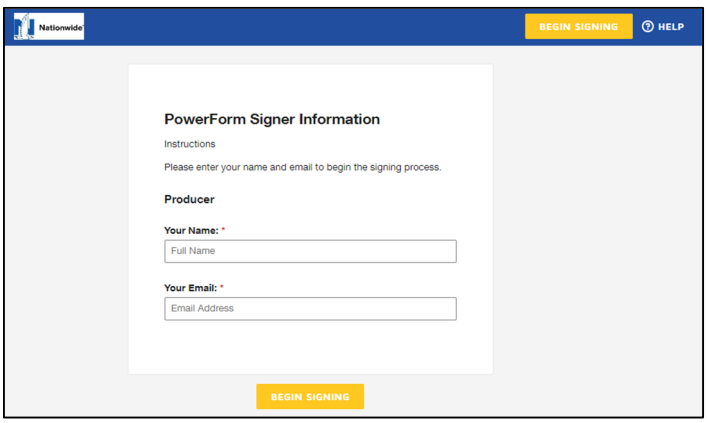
Step 2

Action	Screen
From the **Administration** page, select **Agency Profile**.	

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Add a Non-resident Producer, continued

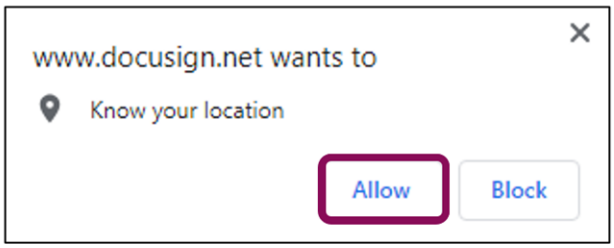
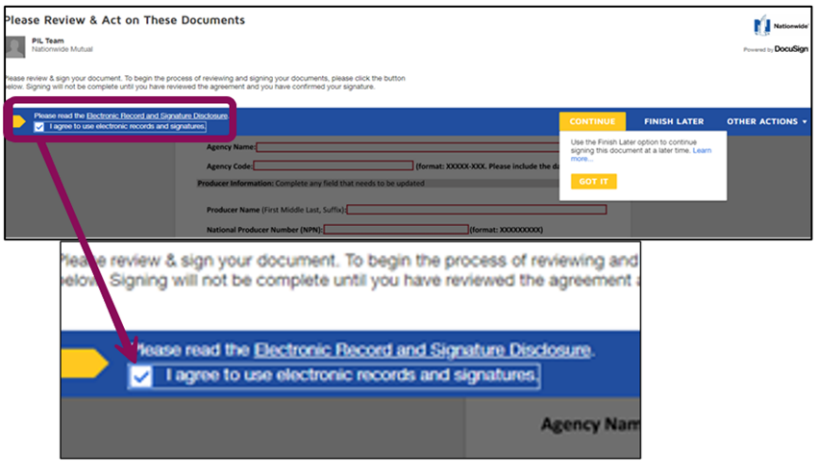
Step 3

Action	Screen
Within the **Appointment requests** section of Agency Profile, select **Non-Resident Appointment Request Form** link.	
Proceed to the DocuSign PowerForm Signer Application. Enter your name and email to begin the signing process.	

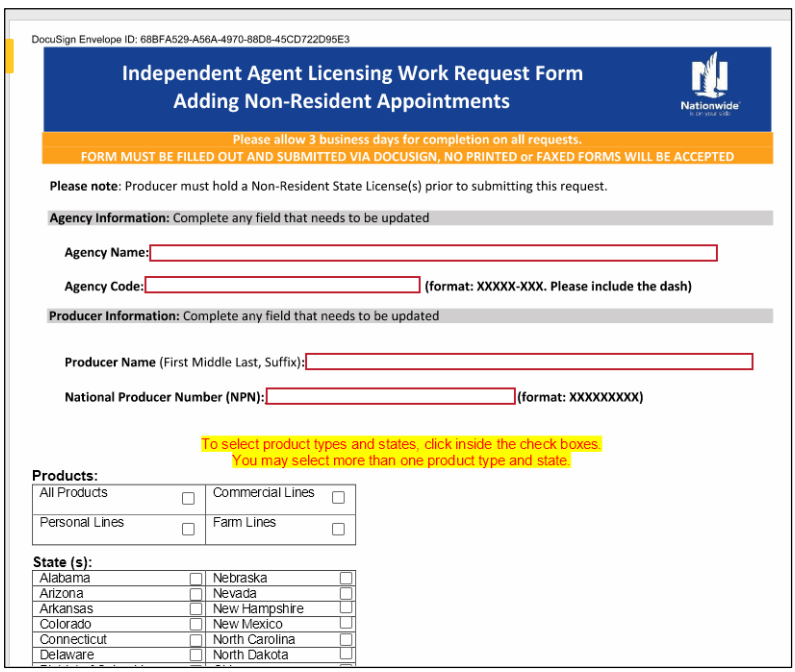
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Add a Non-resident Producer, continued

Step 4

Action	Screen
Select **Allow** if you get this screen.	
Select the **I agree** box and continue.	

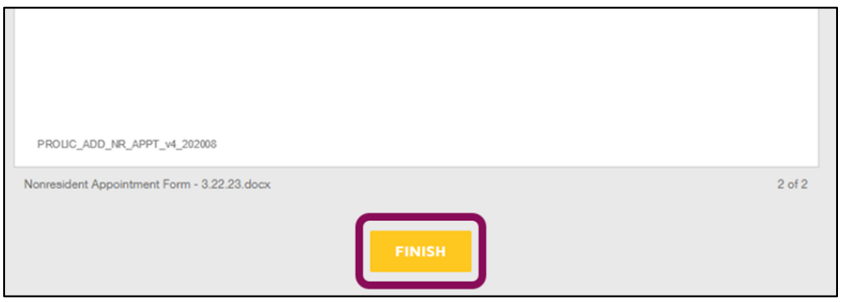
Step 5

Action	Screen
Complete the necessary information.	

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Add a Non-resident Producer, continued

Step 6

Action	Screen
Select **Finish** button to submit. Once submitted, the process usually takes 3-5 business days.	

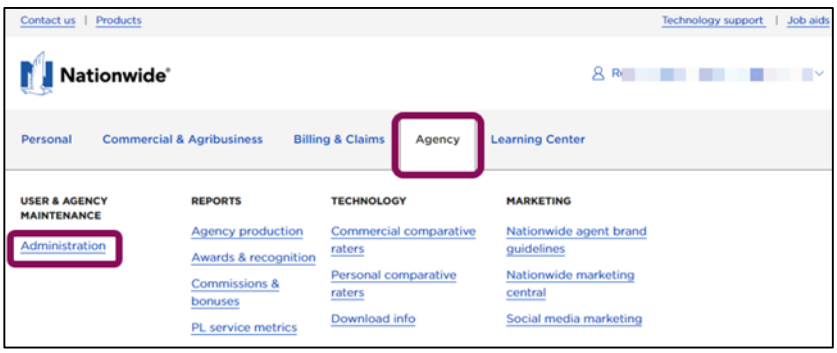
Home

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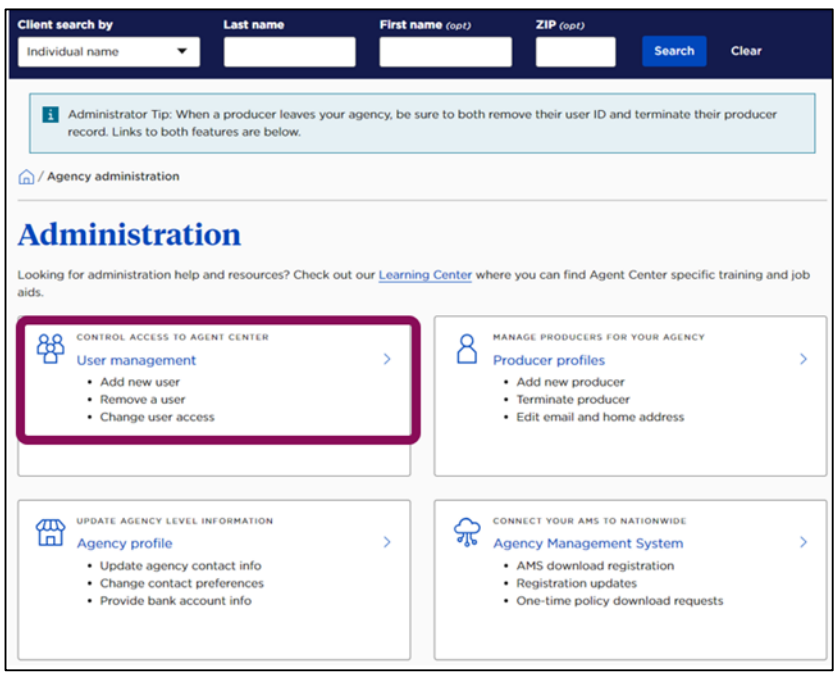
Grant a Producer Access to Agent Center Workspace

If you have Agent Center administrative rights, you can grant a licensed producer as well as non-producer staff process access to various features in Agent Center Workspace by following these simple steps below.

Step 1

Action	Screen
Within Agent Center, choose the **Agency** tab and select **Administration**.	

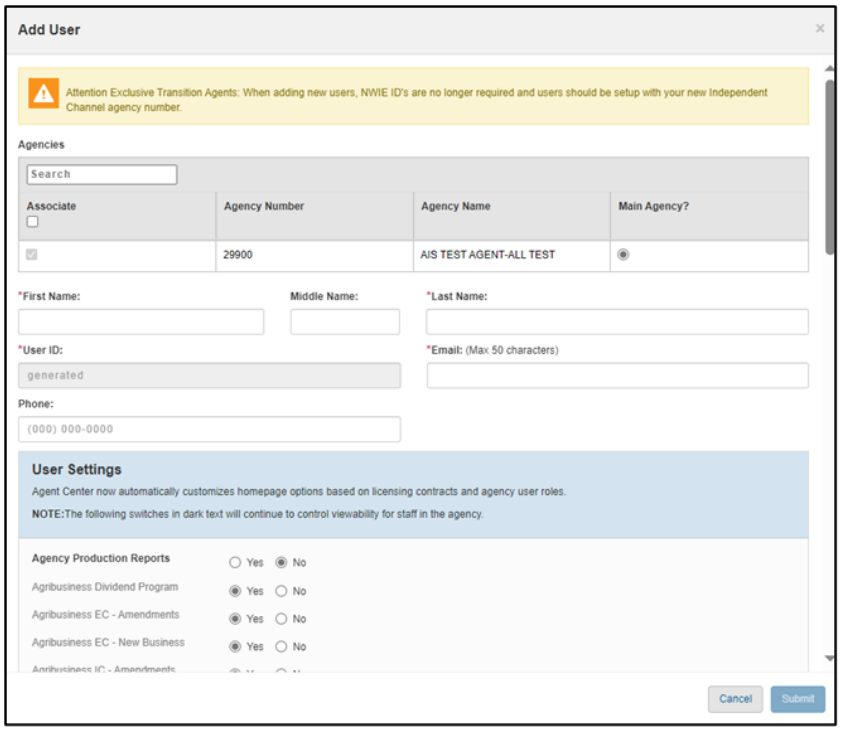
Step 2

Action	Screen
Select **User Management**.	

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Grant a Producer Access, continued

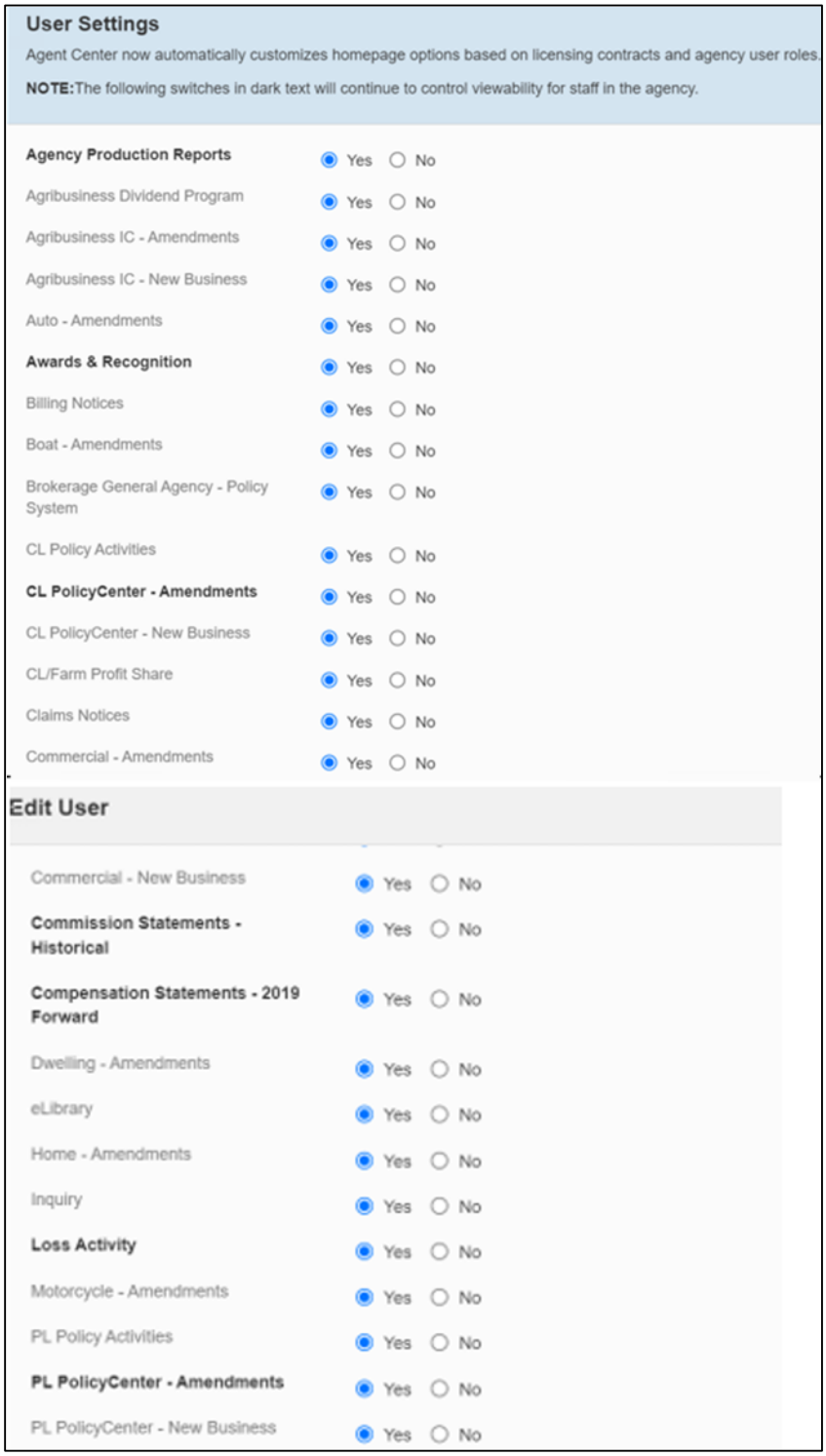
Step 3

Action	Screen
Within **User Management,** you can **Add User**.	

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Grant a Producer Access, continued

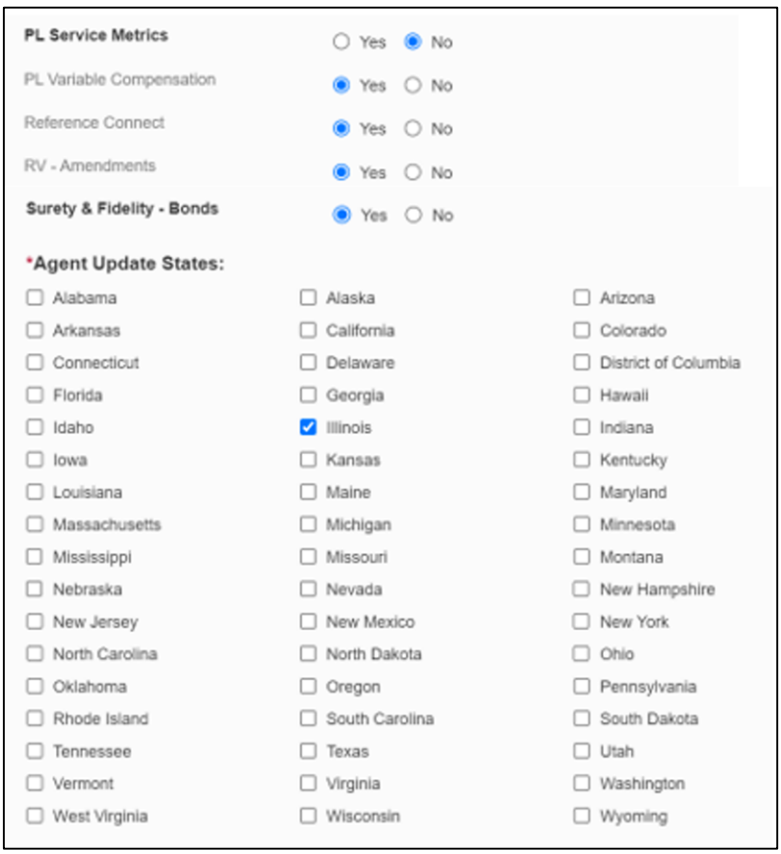
Step 4

Action	Screen
To add additional access for producers, select which items you want to grant them access For Commission access, you must grant the following: • Agency Production Reports • Commission Statements – Historical • Compensation Statements – 2019 Forward • CI/Farm Profit Share • PL Variable Compensation *The above accesses should only be granted to users entrusted as Admins as access to these reports will result in the user being given Admin status and the ability to discuss the agency's compensation with Nationwide. Change the needed information and select “Submit” when finished. **NOTE**: Images for this step continue on the next page.	

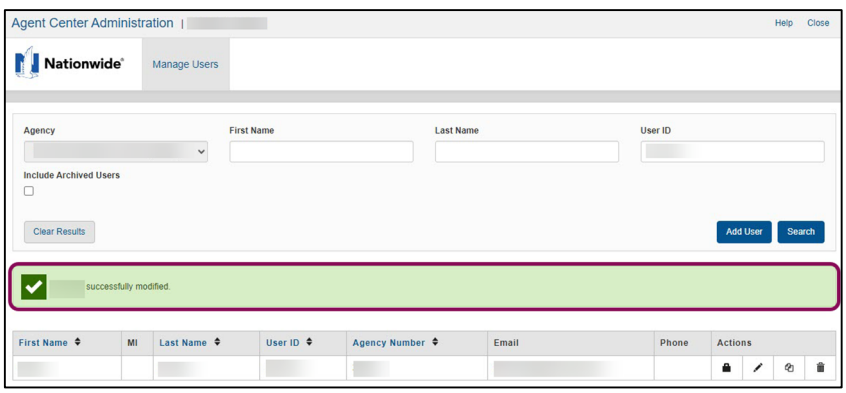
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Grant a Producer Access, continued

Step 4, continued

Action	Screen
NOTE: Continued image	

Step 5

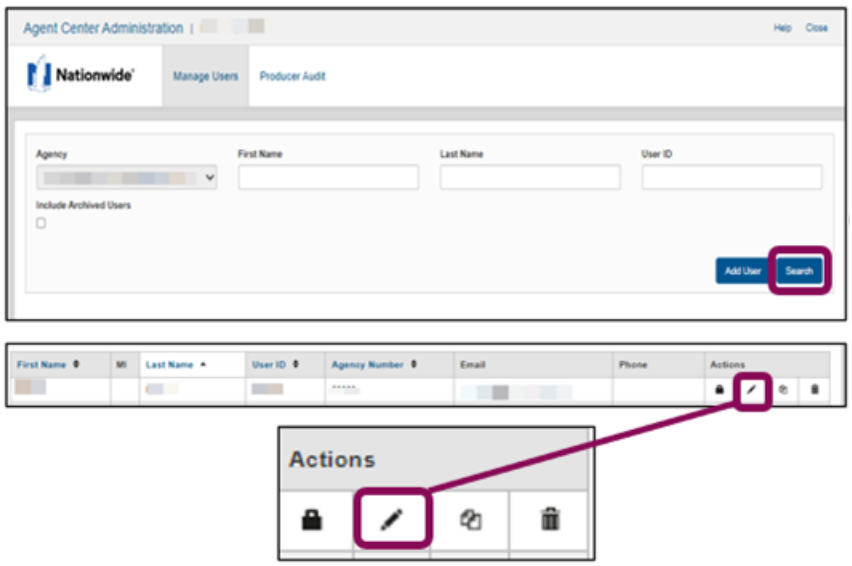
Action	Screen
A confirmation message will display. • If the user is already logged in, the user will need to log out and begin a new session for the modifications to take effect. • Edits to user information will display immediately upon login. • Edits to access may not be immediate if IT fulfillment must be processed.	

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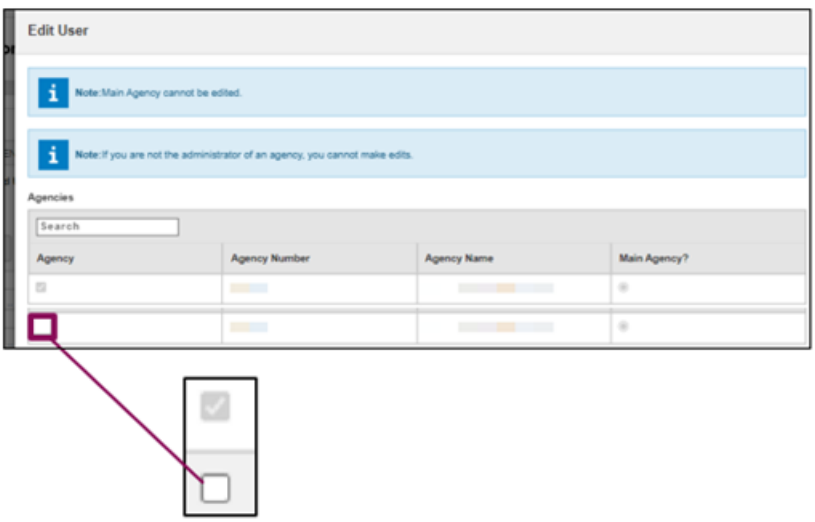
Grant a Producer Access, continued

If you need to edit licensed producer as well as non-producer staff process access in Agent Center Workspace, you can do so by following these simple steps below.

Step 6

Action	Screen
Within **Manage Users,** search all users within your agency. Locate the pencil icon next to the person's name to begin editing.	

Step 7

Action	Screen
The user can now be edited. Add the other agency code(s) by selecting the box next to the code.	

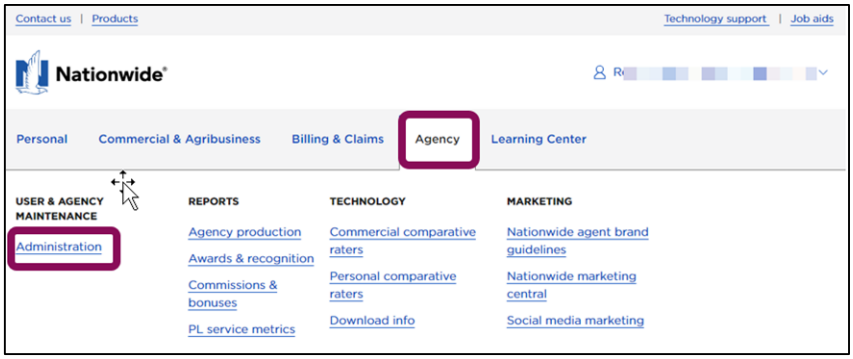
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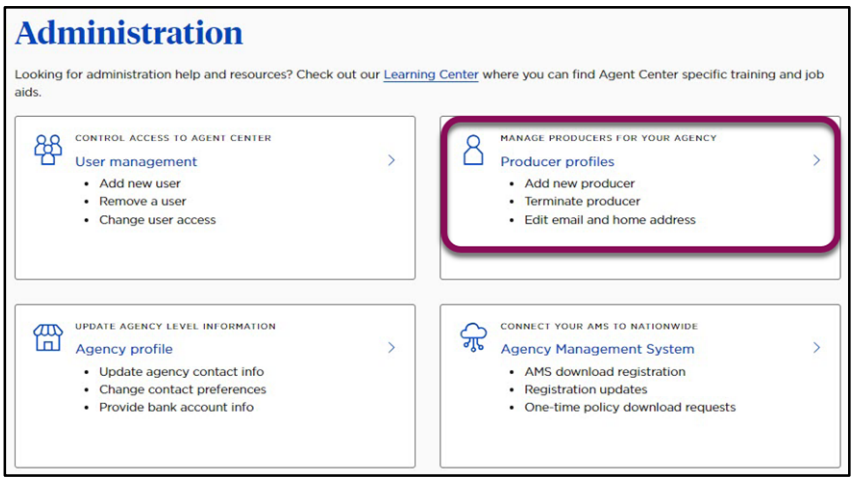
Terminate a Producer

Note: These actions can only be performed by an Agent Center Administrator.

Step 1

Action	Screen
From Agent Center, choose the **Agency** tab and select **Administration**.	

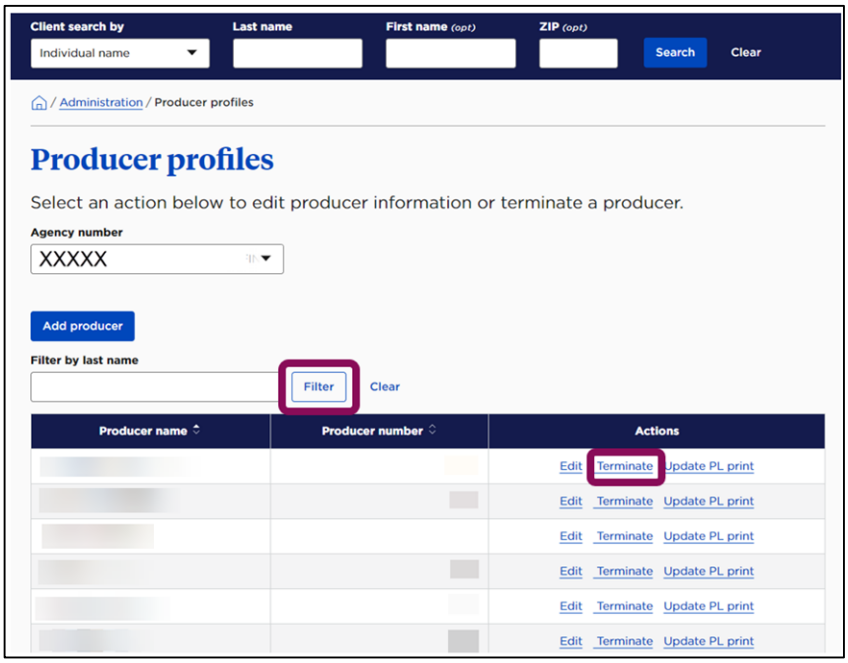
Step 2

Action	Screen
In the **Administration** section, select **Producer profiles**.	

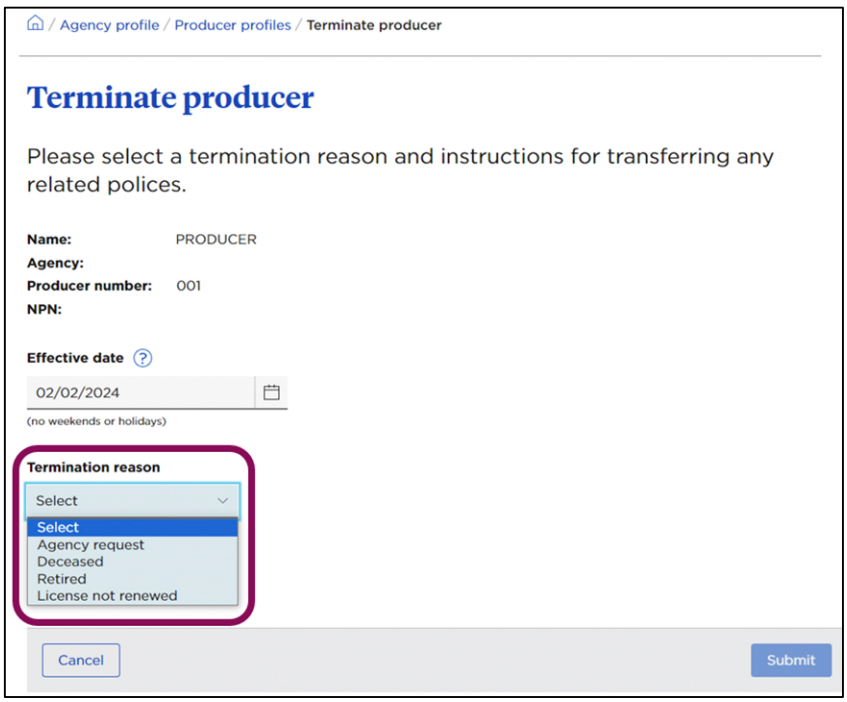
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Terminate a Producer, continued

Step 3

Action	Screen
If needed, search for **Producer name** by selecting the **Filter** button. Select **Terminate** under the **Actions** column.	

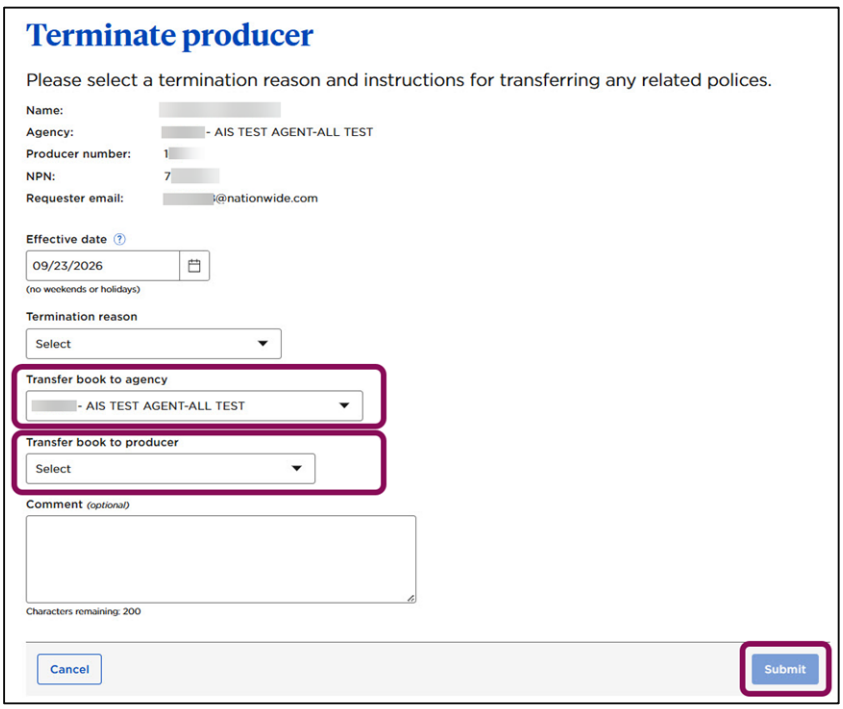
Step 4

Action	Screen
Select the **Termination reason** from the dropdown.	

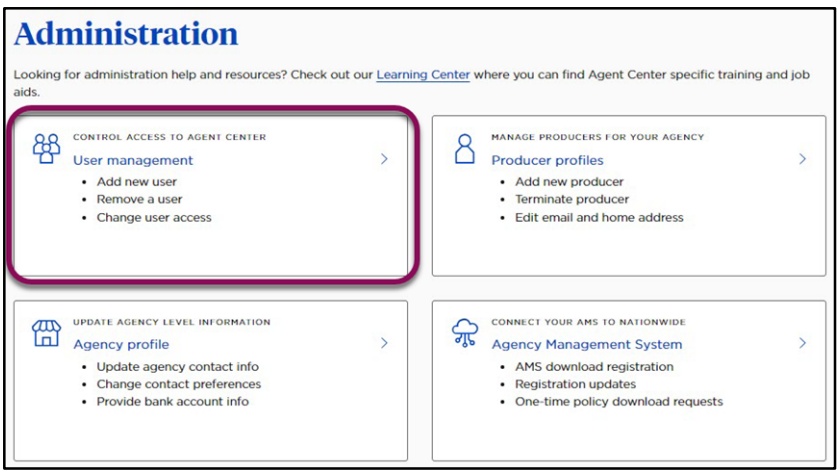
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Terminate a Producer, continued

Step 5

Action	Screen
To move policies from that producer to you (or anyone else you choose as the producer) at renewal, select the appropriate agency in the “Transfer book to agency” dropdown. Next, select the desired producer in the “Transfer book to producer” dropdown. Enter a comment (optional). Select “Submit”. **IMPORTANT NOTE: If you are the admin of only one agency, you will not see the “Transfer book to agency” field and will only need to select the desired producer from the “Transfer book to” field.**	

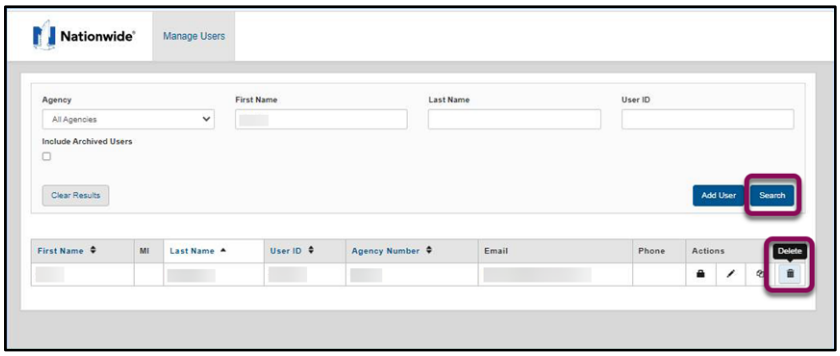
Step 6

Action	Screen
Note: Nationwide recommends that, if necessary, you remove the user from Agent Center for their Agency via the **User Management** section.	

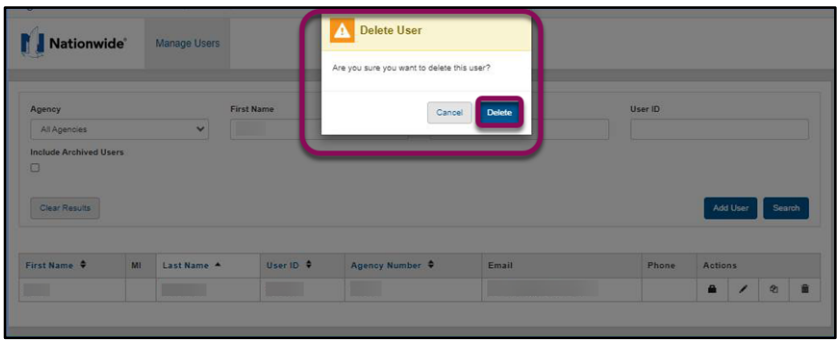
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Terminate a Producer, continued

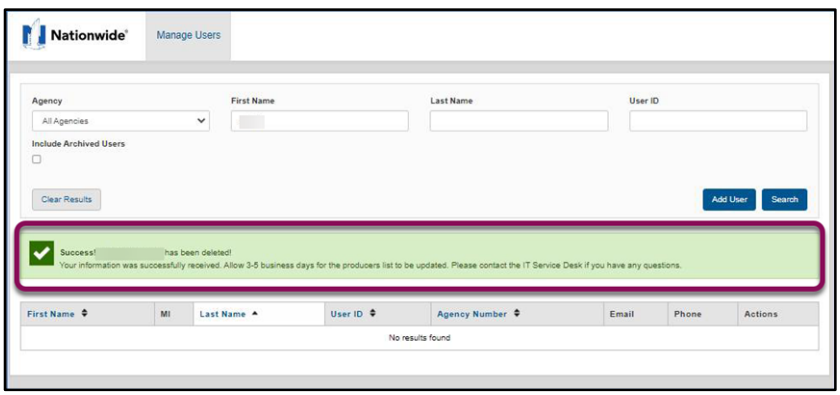
Step 7

Action	Screen
In the **User Management** section, search for the terminated producer by completing the required fields and selecting **Search**. Once located, select the **Delete** icon for that entry.	

Step 8

Action	Screen
A pop-up will be displayed asking for confirmation of the user's deletion. Select **Delete**.	

Step 9

Action	Screen
After selecting, a success message will notify you of the deletion of the user.	

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