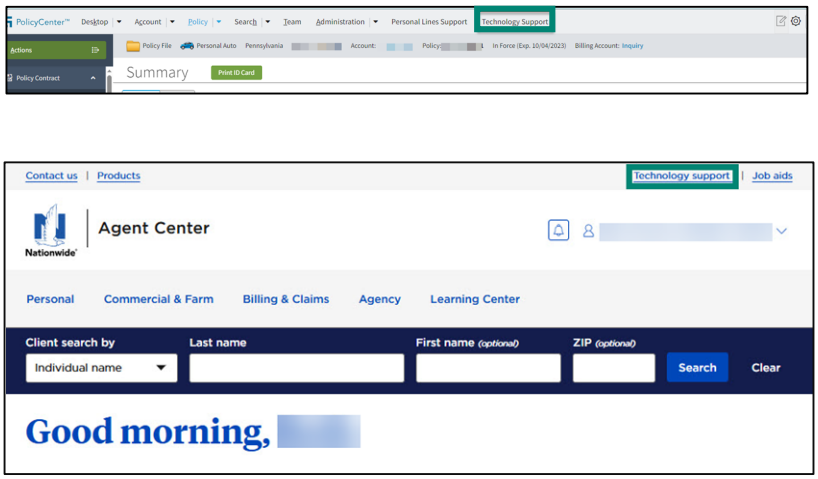
Use Self-Service Agent Portal

Agent Center: Technology Support

Description

This job aid describes how agents can self-service through a user-centered portal. This portal allows you not only to submit cases but also to follow up and see the real-time status of items you submit via the portal (web) or phone. The portal also provides the opportunity for you to view items opened by others in the agency or, if you have multiple agencies, all items are available to view.

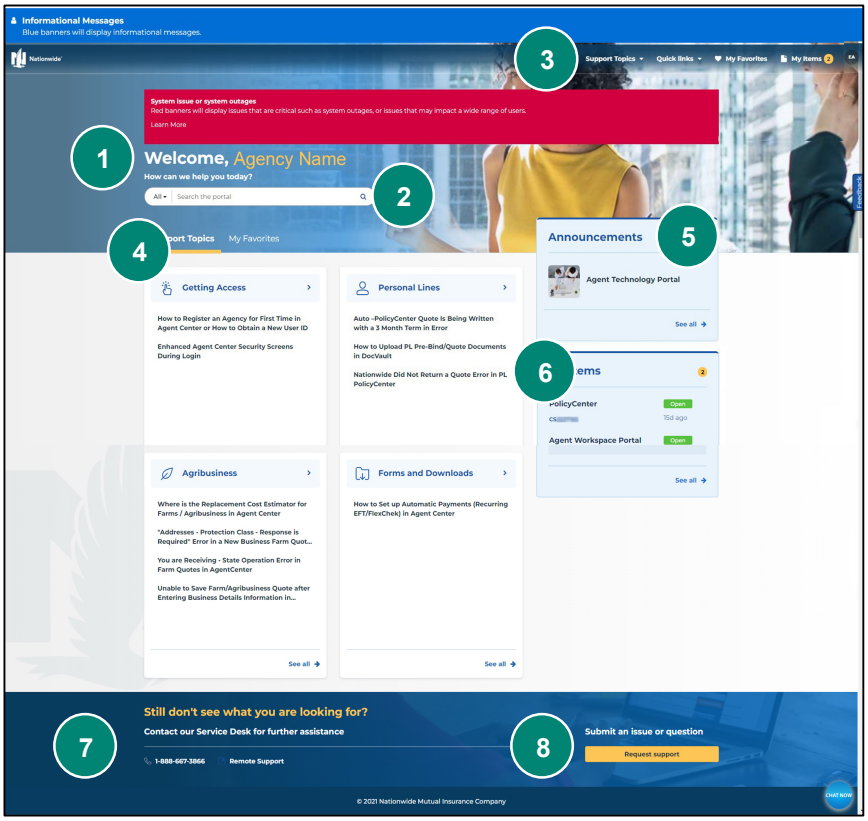
Step 1

Action	Screen
Select the **Technology Support** link from either the PolicyCenter menu or the **Agent Center Workspace** landing page. The link opens the new portal in its own browser window.	

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Step 2

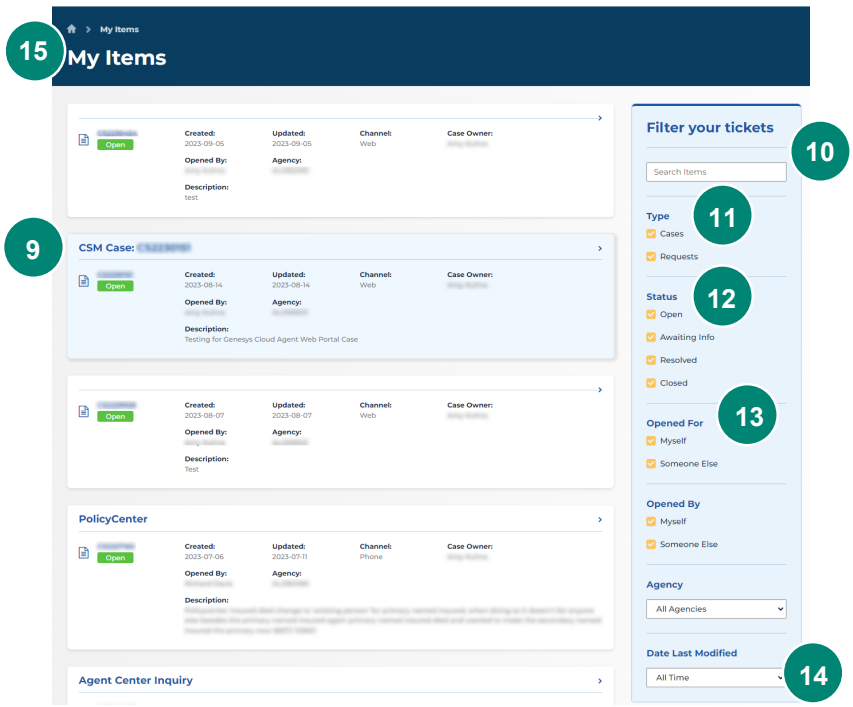
Action	Screen
The Technology Support screen displays. A description of each field corresponds with a number on the screen. 1. The **welcome** displays your agency's name. 2. You can **search knowledge** articles for issues or questions. You will only see articles pertaining to the license(s) you have and the work you do. 3. This is the **Option Bar:** a. **Support Topics** - drop down of topics display. b. **Quick Links** - drop down of Agent Center, PolicyCenter, Nationwide Agents and Nationwide.com. c. **My Favorites** - save your favorite pages for easy reference. d. **My Items** - displays items that have been submitted for review. (See step 3.) e. Select on **your initials at the top**, right corner of the screen and you can review your account profile or logout. 4. **Support Topics** and **My Favorites** display. Choose the appropriate tab to view contents. 5. **Announcements** display and can be updated at any time. 6. **My Items**: select the case number to view. (See step 3.) 7. The TSD contact information displays. 8. To **create a case**, submit an issue or question here.	

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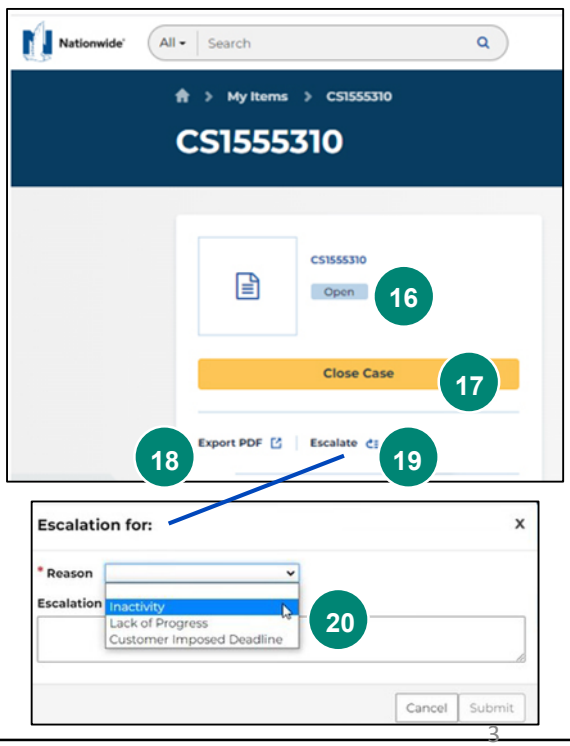
Use Self-Service Agent Portal

Agent Center: Technology Support

Step 3

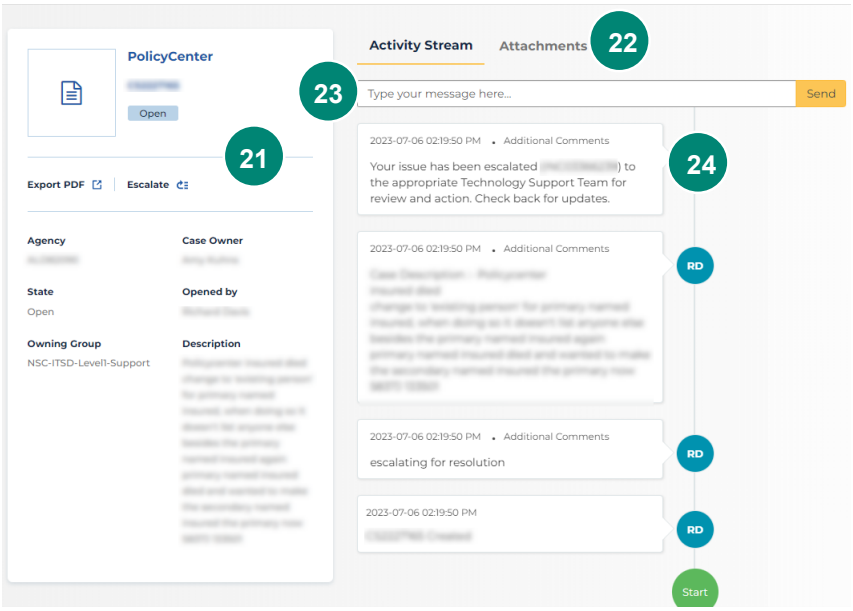
Action	Screen
My Items provides you the ability to do multiple things. A description of each field corresponds with a number on the screen. **9.** Your cases display with **case number**, when it was created and updated, who it was assigned to, channel (web always), case owner and status. Select any case to review. **10**. You can **search** for a specific case by filtering your items. **11. Type** - view cases and/or requests. **12. Status** gives you the ability to search by one or all types of status. **13. Opened For** defaults to **Myself.** You can select **My Agency** to provide others in the agency group with the ability to review their cases; plus, any other agency you are licensed with also displays. **14. Date Last Modified** - view 30 days, 90 days, one year or all time. **15**. You can return to the **Home Page** by selecting the **Home icon**.	

Step 4a

Action	Screen
16. Case info displays number and **Open** status. **17.** Select **Close Case** to close the case. **18.** You can export to a PDF for your records. **19.** There is no reason to escalate when creating a web case. The expected resolution date will be in the notes for the ticket. If the expected resolution date is not listed, the agent can request information by replying to the ticket. Escalate is an option if the case is not moving or being worked. The ticket can be escalated if there is no response/update on the ticket and the date exceeds the expected resolution date. You can escalate to a team for review by selecting **Escalate.** **20.** The **Escalate For**: dropdown appears. Select a reason. (Inactivity, Lack of Progress or Customer Imposed Deadline). Once the case is escalated, it is reviewed for status update. When a ticket is escalated or de-escalated, the reason displays.	

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Step 4b

Action	Screen
21. The case information includes: • Account is your agency code in which the ticket was created • Status of case • Case owner • Description that was put in the case • What group owns the case • Ability to export to pdf and escalate **22.** You can add **Attachments** here. **23.** **Type your message** with additional information on the case and select the Send button. **24.** Details from the case with dates and times. Any updated comments are added to the case detail. If an incident (inc.) is related, any updates to the inc. also display in the case detail. The resolution detail from the case is displayed in the case via the agent portal.	

Frequently Asked Questions

How do agents have access to the Portal?

a. An agent must have an Agent Center User ID.
b. Not all agents have logged into Agent Center; thus, they many not have access due to no User ID.

Can agents search Knowledge?

a. Agents can search knowledge. They can view any knowledge that is associated to their licenses.
b. Use the search bar on the main page, input the question and knowledge options display to open and read.
c. If agents select a knowledge that is not associated to their license, a message indicates that they do not have the correct access.

Why does the case number field turn red when I am working on the case?

a. The case turns red because an agent as escalated this case for further review.

How can I tell working a case if it has been created by another person?

a. When reviewing the case look in the additional information the name of the person who created the case will display. It will be different than the case owner.

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