

Create eSignature Envelope (DocuSign) PolicyCenter



This job aid reviews how to create an envelope through DocuSign, and then email or text the envelope to all required signers to collect electronic signatures.

Note: Customers can attach required documentation to a DocuSign envelope, if necessary.

DocuSign is a web-based application for customers to, securely, electronically sign & return emailed documents back to your agency or Nationwide.

For information on linking a DocuSign account to PolicyCenter, please refer to [Linking Nationwide PolicyCenter to Agency DocuSign Account](#).

All documents sent to a customer via DocuSign are protected by an access code. The access code is the customer's 5-digit mailing ZIP code. Please confirm the ZIP code with your customer prior to sending documents.

After a policy is bound in PolicyCenter, agents must send the policyholder various documents that require the customer's signature. The two choices would be for the customer to sign the documents in person or to send the documents to be electronically signed (eSignature) by the customer via a secure email through DocuSign.

PolicyCenter allows you to set up automatic delivery of these eSignature documents using the **Automated Electronic Delivery of Required Documents** option on the *Policy Info* screen.

If the Automated question is answered "Yes," PolicyCenter automatically emails all required documents to your customer. However, you will need to send any optional documents manually once the policy is bound. If the answer is "No" to the Automated question, you must send all documents manually through the eSignature envelope available on the *Documents* screen in PolicyCenter.

A screenshot of the 'Nationwide Documents/Email' form. The first question, 'Automate Electronic Delivery of Required Documents?', is highlighted with a red box and has the 'No' radio button selected. Below this, there is a dropdown menu for 'Document Delivery Preference New Selection' set to 'Online Account Access'. The 'Email Address' field contains 'elizabeth@email.com'. A message at the bottom states 'Online Account access will be set up for this customer.'

This job aid starts at the *Submission Bound* screen at the completion of the policy submission process. This job aid assumes you answered "No" to the Automated question on the *Policy Info* screen and must create an envelope with required and optional documents

Note: If you answered "Yes" to the Automated question, no action is required since everything will automatically be emailed to the customer. Please remember, it could take up to 10 minutes for the customer to receive the email.

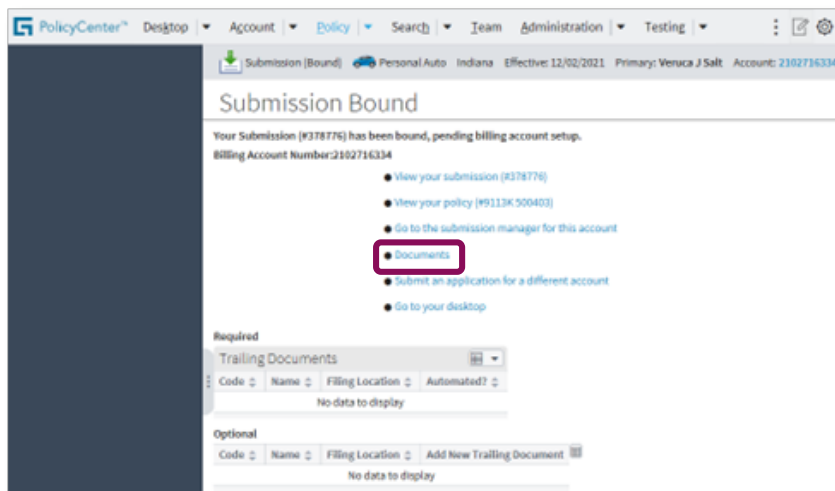
Step 1

Action

During submission of a new policy, a link to the *Documents* screen can be found on the *Submission Bound* screen.

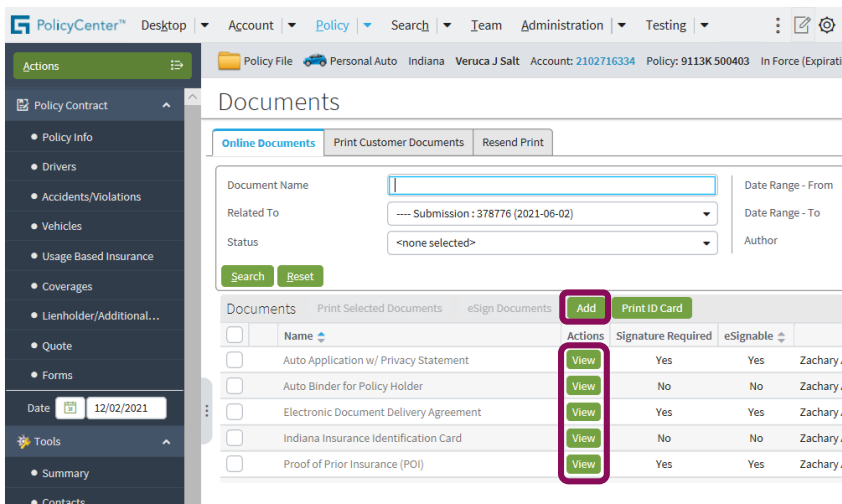
- Select the **Documents** link.

Screen



The documents defaulting on the *Documents* screen are those requiring action. This includes documents needing signatures, additional documentation to be obtained from the customer, or documents/receipts to be given to the customer.

- Additional documents can be found by selecting the **Add** button. These documents are optional but are available to be included in the eSignature envelope.
- There are two ways to obtain the customer's signature. The customer can either physically sign printed documents (select the **View** button to generate a PDF) or electronically sign documents using eSignature.



Step 2

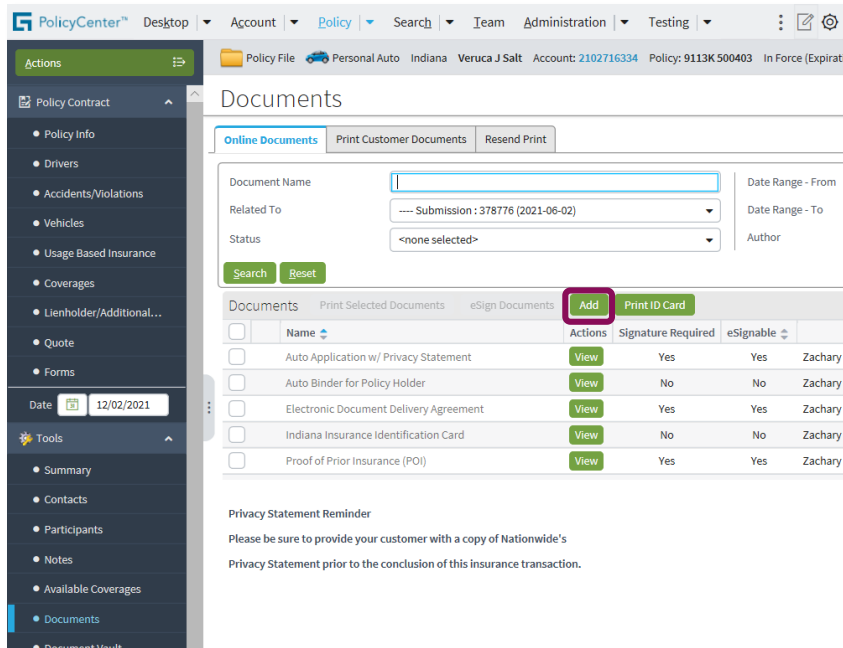
Action

Note: Steps 2 and 3 are only applicable if you are adding additional documents to an eSignature envelope. If no additional documents need to be added, go to Step 4.

On the *Documents* screen:

- Select the **Add** button.

Screen



The screenshot shows the PolicyCenter interface. On the left is a sidebar with 'Actions' and 'Tools' sections. The 'Documents' section is active. The main area shows a 'Documents' table with columns: Name, Actions, Signature Required, eSignable, and Author. The 'Add' button is highlighted with a red box. Below the table is a 'Privacy Statement Reminder' section.

Step 3

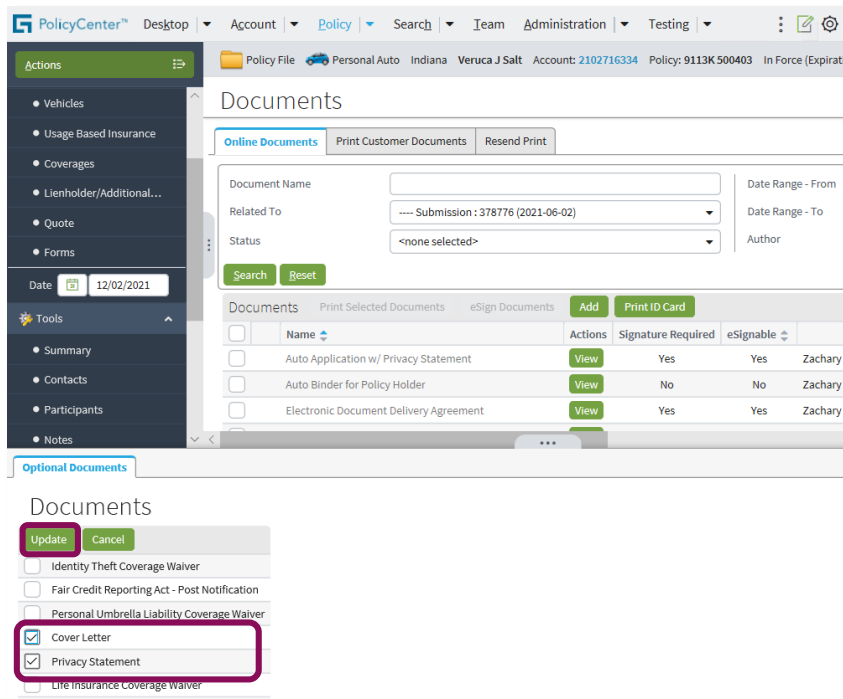
Action

Note: Steps 2 and 3 are only applicable if you are adding additional documents to an eSignature envelope. If no additional documents need to be added, go to Step 4

In the *Optional Documents* pane at the bottom of the screen:

- Select the checkboxes to the left of the documents you want to add to the envelope.
- Select the **Update** button.

Screen



The screenshot shows the PolicyCenter interface. The 'Optional Documents' pane is open at the bottom. It contains a list of documents with checkboxes: Identity Theft Coverage Waiver, Fair Credit Reporting Act - Post Notification, Personal Umbrella Liability Coverage Waiver, Cover Letter (checked), Privacy Statement (checked), and Life Insurance Coverage Waiver. The 'Update' button is highlighted with a red box. The 'Cover Letter' and 'Privacy Statement' checkboxes are also highlighted with a red box.

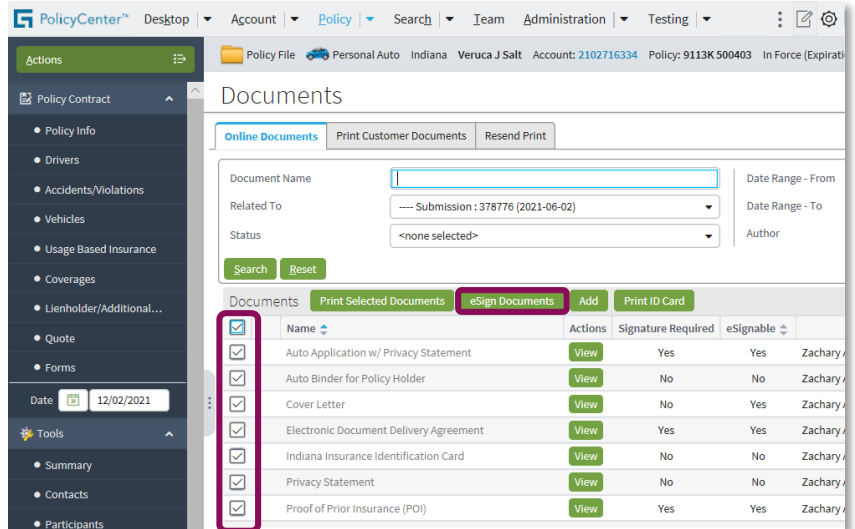
Step 4

Action

At least one document selected must have a "Yes" status in the eSignable column to create an eSignature envelope.

- Select all documents you want to provide to the customer by selecting the checkbox next to them. If you select the checkbox in the header (outlined in blue), ALL the documents will be selected.
- The selected documents will create an envelope to be emailed and/or texted to the required signers.
- Select the **eSign Documents** button to securely email the documents to the customer.
- **Note:** The Producer email will show on the *Required Signer(s)* screen because all documents are automatically sent to the agency when a policy is bound.

Screen



Document Name	Related To	Status	Signature Required	eSignable	Author
<input checked="" type="checkbox"/>	Auto Application w/ Privacy Statement	View	Yes	Yes	Zachary
<input checked="" type="checkbox"/>	Auto Binder for Policy Holder	View	No	No	Zachary
<input checked="" type="checkbox"/>	Cover Letter	View	No	Yes	Zachary
<input checked="" type="checkbox"/>	Electronic Document Delivery Agreement	View	Yes	Yes	Zachary
<input checked="" type="checkbox"/>	Indiana Insurance Identification Card	View	No	No	Zachary
<input checked="" type="checkbox"/>	Privacy Statement	View	No	No	Zachary
<input checked="" type="checkbox"/>	Proof of Prior Insurance (POI)	View	Yes	Yes	Zachary

Step 5

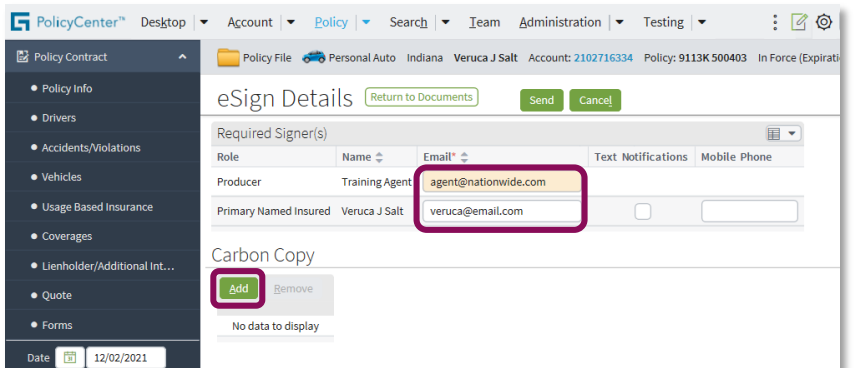
Action

On the *eSign Details* screen:

- Enter or verify email address(es) for required signers.

Note: You can send a copy of the eSignature envelope to additional email addresses through the **Add** button in the *Carbon Copy* section. These would be additional insureds or others that are not required signers.

Screen



Role	Name	Email	Text Notifications	Mobile Phone
Producer	Training Agent	agent@nationwide.com	<input type="checkbox"/>	
Primary Named Insured	Veruca J Salt	veruca@email.com	<input type="checkbox"/>	

Carbon Copy

Add Remove

No data to display

Step 6

Action

Note: This step includes instructions if you want to send the eSignature envelope via text message.

- Select the checkbox in the **Text Notifications** column and enter the number in the **Mobile Phone** column.

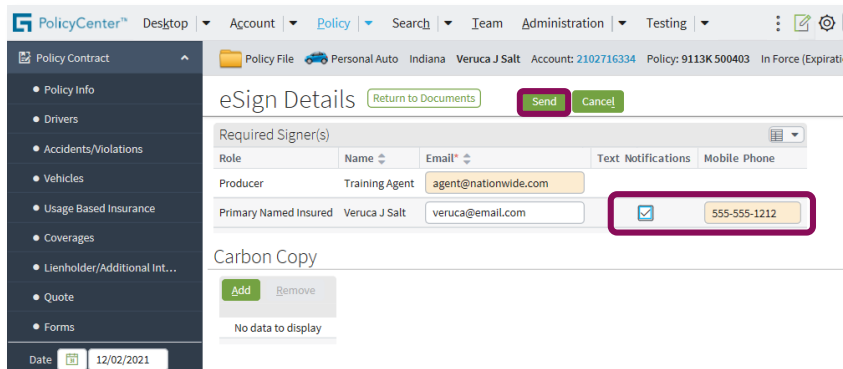


When using the text message option, the insured will be prompted to enter an access code when signing via text message.

You must notify the insured to enter their five-digit account zip code in place of the access code.

- Select the **Send** button.

Screen



Step 7

Action

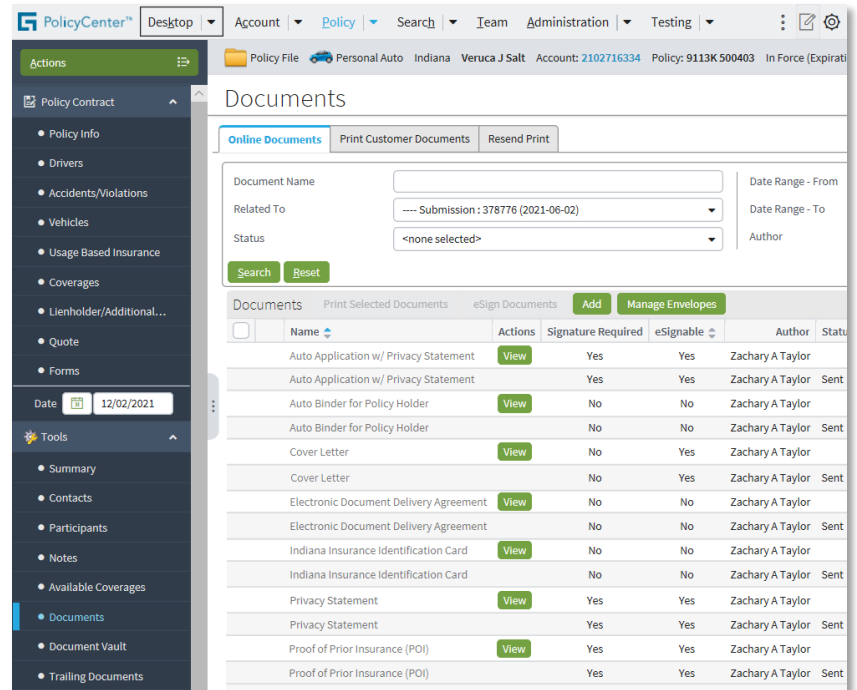
An email and/or text message is sent to all recipients.

PolicyCenter produces a second set of documents during the eSignature envelope creation process. The second set of documents includes signatures once the process completes. The first set does not include signatures at any point.

Note: A status of *Created* displays after initially sending eSignature documents (may take up to 10 minutes for the status to change). Please remind the customer that it may take up to 10 minutes for the insured to receive the documents via a secured email from DocuSign.

The eSignature process is complete once the customer has signed all required documents, returned any uploaded supporting documents, and have been sent back and verified by Nationwide or the agency. At that time, the **Status** column automatically updates from *Sent* to *Completed*.

Screen



Name	Actions	Signature Required	eSignable	Author	Status
Auto Application w/ Privacy Statement	View	Yes	Yes	Zachary A Taylor	Sent
Auto Application w/ Privacy Statement	View	Yes	Yes	Zachary A Taylor	Sent
Auto Binder for Policy Holder	View	No	No	Zachary A Taylor	Sent
Auto Binder for Policy Holder	View	No	No	Zachary A Taylor	Sent
Cover Letter	View	No	Yes	Zachary A Taylor	Sent
Cover Letter	View	No	Yes	Zachary A Taylor	Sent
Electronic Document Delivery Agreement	View	No	No	Zachary A Taylor	Sent
Electronic Document Delivery Agreement	View	No	No	Zachary A Taylor	Sent
Indiana Insurance Identification Card	View	No	No	Zachary A Taylor	Sent
Indiana Insurance Identification Card	View	No	No	Zachary A Taylor	Sent
Privacy Statement	View	Yes	Yes	Zachary A Taylor	Sent
Privacy Statement	View	Yes	Yes	Zachary A Taylor	Sent
Proof of Prior Insurance (POI)	View	Yes	Yes	Zachary A Taylor	Sent
Proof of Prior Insurance (POI)	View	Yes	Yes	Zachary A Taylor	Sent

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.
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- (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.