

Document Vault Guide



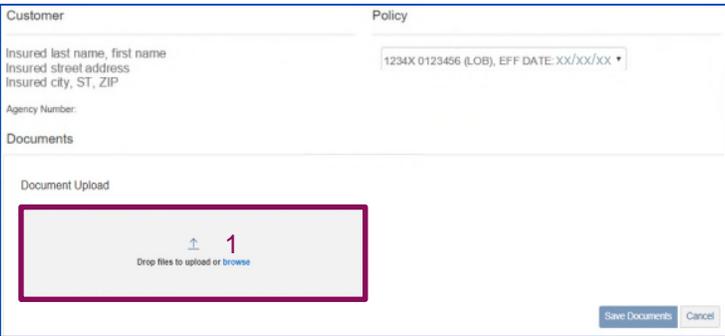
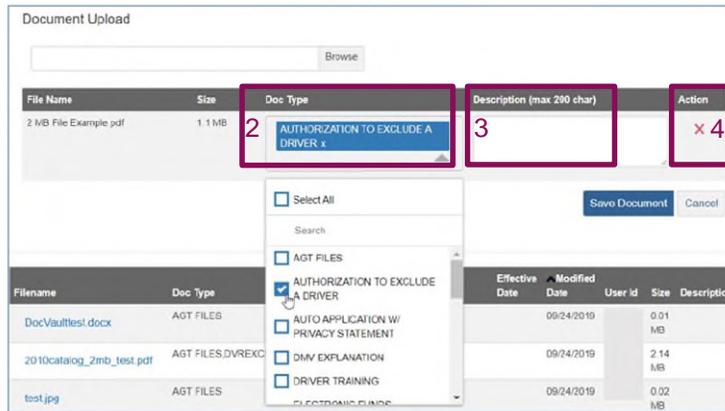
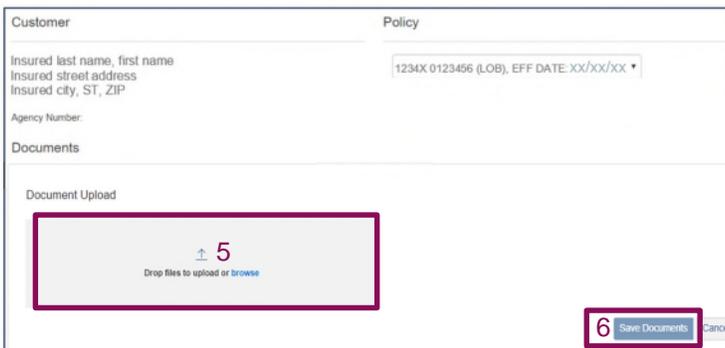
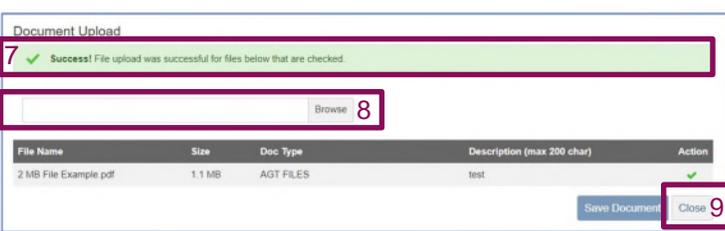
Search by Policy Number

Action	Screen
The 'Search' field defaults to 'Policy'. Key the policy number and select the 'Search' button.	
Any documents that are available in DocVault for the policy display in a listing. Each file name will be a link that can be selected for viewing the document. If the policy is associated with other policies, there will be a dropdown enabling the selection of other policies for the same insured/ household.	

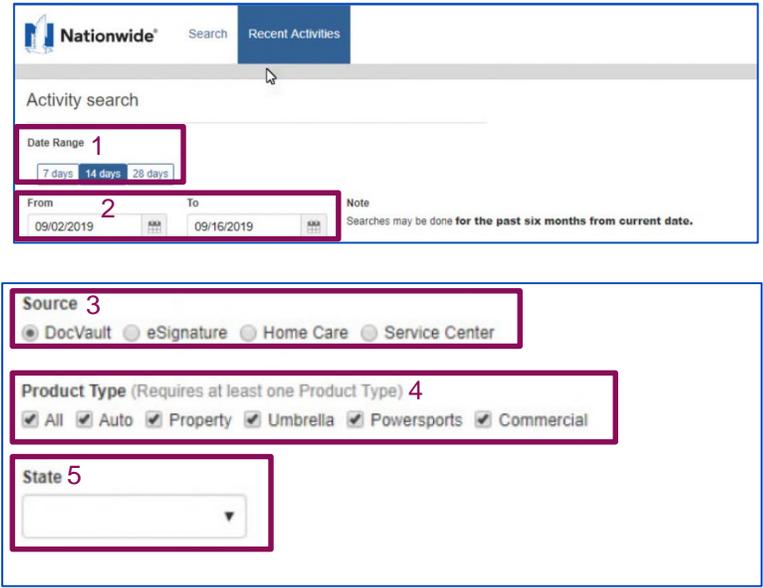
Search by Name

Action	Screen
Select 'Name' from the dropdown and then key the name (last name, first name) and select the 'Search' button.	
A listing of insureds displays based on the name information entered. If more than 10 results are returned, additional page navigation buttons display to assist in the search 1. Select the 'View Information' link under 'Policy Number' column to display any policies in the systems associated to that customer. 2. Policy numbers listed will indicate the line of business and effective date. They display as links to the specific policy information and any uploaded documents available.	

Uploading a Document

Action	Screen
<p>The 'Document Upload' section displays in the 'Documents' section of the screen.</p> <ol style="list-style-type: none"> 1. Select 'browse' to navigate to the document you want to upload. The document could be stored on your computer or on a drive. You can also utilize the drag and drop feature on the landing pad. Document file size is limited to 10 MB. 	
<ol style="list-style-type: none"> 2. Choose a 'Doc Type' from the dropdown and classify the document to ensure any internal referral processes are started immediately. 3. Key a description. This information may be helpful to expedite processes and reduce follow-up calls. 4. Click the red 'x' to remove the document, if needed. 	
<ol style="list-style-type: none"> 5. To upload more documents, select the 'browse' button again or utilize the drag and drop feature. Up to 50 documents may be added in one upload session; however, the more documents loaded increases the processing wait time. 6. Select the 'Save Documents' button to upload. 	
<ol style="list-style-type: none"> 7. Once saved, a success message displays. If an error occurs, an alert message displays. 8. To add additional documents, select the 'Browse' button to begin the upload process again. 9. Click 'Close' to refresh the screen. 	

Recent Activity Search

Action	Screen
<p>This screen provides the ability to see recently uploaded documents. Filters are available for date range, selected dates, source and product type to return more accurate results.</p> <ol style="list-style-type: none"> 1. Select the 7, 14 or 28 days buttons to automatically set the search criteria to that date range. 2. Use the 'From' and 'To' fields to search for documents uploaded during the past six months from the current date. 3. Choose a 'Source'. Only one can be selected at a time: <ul style="list-style-type: none"> • DocVault – documents uploaded directly through DocVault by your agency or associated agencies • eSignature – documents uploaded through the eSignature process for a specified policy • Home Care – documents uploaded by the automated loss prevention system for a property inspection • Service Center – documents uploaded by Service Center staff for a specific policy 4. Product type – select all or choose at least one type – options are 'All', 'Auto', 'Property', 'Umbrella', 'Powersports' or 'Commercial' (includes Farm) 5. State – optional field, use to narrow search results 	 <p>NOTE: Recent activities only display a maximum of 2,000 results. Use the filters to narrow your search.</p>

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