

eSignature Process for Signers (DocuSign) PolicyCenter



This job aid reviews the email process to collect electronic signatures (DocuSign). All required signers will receive an email. Depending on the document, this includes the Agent.

The customer may also be required to upload documents such as Proof of Insurance (POI), Proof of Driver Training, Alarm Certification, etc. as part of the eSignature process. It is important to remind the customer they will need to upload the document, as the navigation process does not stop them on the appropriate screen. If they do not upload the document, you will receive an Activity on your PolicyCenter Desktop in ten (10) days as a reminder the document is still pending.

Step 1

Action

A Cover Letter is sent along with the eSignature email.

The Cover Letter provides a description of steps required to electronically sign (eSign) documents and reminds customers additional documents, such as the good student grade card, can be submitted through this process as well.

Note: These correspondences will come from DocuSign, so please let the customer know that they will be receiving these via DocuSign.

Screen



Nationwide®
is on your side

IMPORTANT NOTICE

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Thank you for choosing Nationwide® to help you protect what's important to you. As a valued member, we want to notify you there are NEW policy forms for you to sign.

What you need to do

To avoid possible premium increases or the cancellation of your policy, please complete the following steps within 10 days of receiving this correspondence:

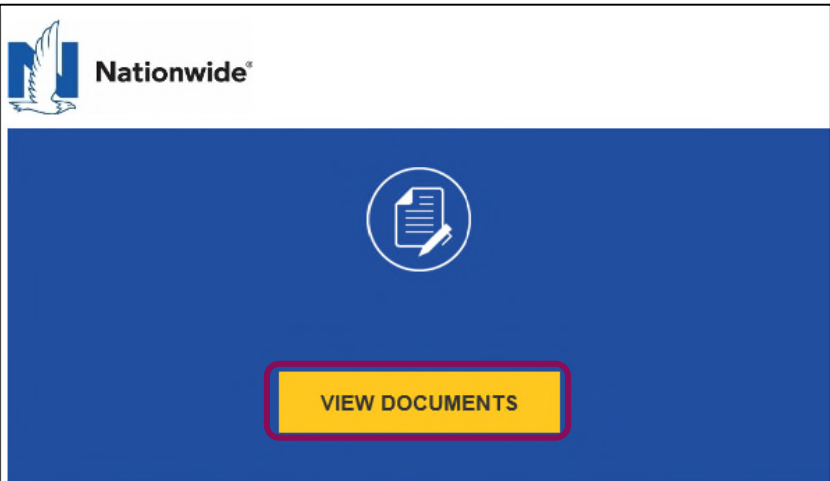
1. Select the "Start or Next" button below to review your forms.
2. Review each form, and you'll be prompted to electronically sign where you see the "Sign Here" button.
3. You may have discussed with your representative the need to provide additional documentation to complete your request. If so, you will see a blank page with an "Attachment" button. You'll need to click on the button and upload your documentation.
4. When you have reached the end, you'll see a button labeled "Finished." Please click on this button and you will complete the process.

Important note: If you do not electronically sign these forms, you will need to print, sign and return your forms within 10 days to: One Nationwide Gateway, Dept. 5825 Des Moines, IA 50391-5825.


You can always count on us to be there

We appreciate your business and look forward to continuing to serve you. If you have any questions, or would like an On Your Side® Review to learn about additional coverage options, please contact your Nationwide agent, the Nationwide Service Center at 877-ON YOUR SIDE (877-669-6877) or go online at MyNationwide.com to access your policy.

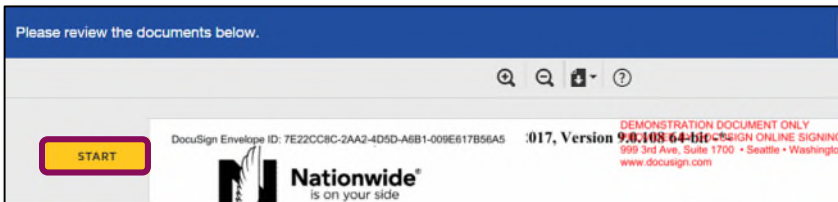
Step 2

Action	Screen
<p>To begin the eSignature process:</p> <ul style="list-style-type: none"> Select the View Documents button. 	 <p>Thank you for choosing Nationwide to help you protect what's important to you. As a valued member, we wanted to notify you there are NEW Policy Forms for you to sign. Please follow the steps below.</p> <p>What you need to do Please click on the link provided in this email and follow the directions. Once the forms have been completed and signed, a confirmation message will be displayed. You will also receive an additional email with a link to your completed forms for your records. Please sign the forms within 10 days to avoid possible premium increase or cancellation of your policy.</p>

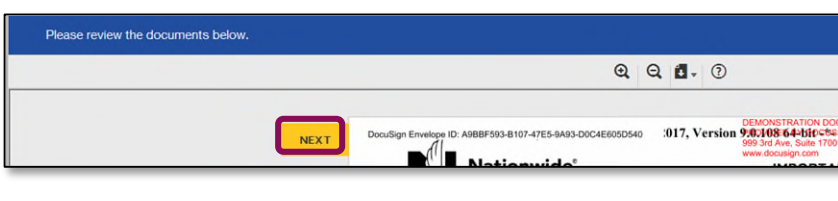
Step 3

Action	Screen
<p>The <i>View Documents</i> screen displays:</p> <ul style="list-style-type: none"> Select the checkbox to agree to use the electronic record and signatures. Select Continue. <p>Note: Signers can also choose the Finish Later or Decline to Sign options.</p> <p>If a customer chooses to decline to sign, you will need to provide the documents in an alternate manner, such as:</p> <ul style="list-style-type: none"> Print and mail them directly to the customer Print and have the customer come in and sign the documents in person 	

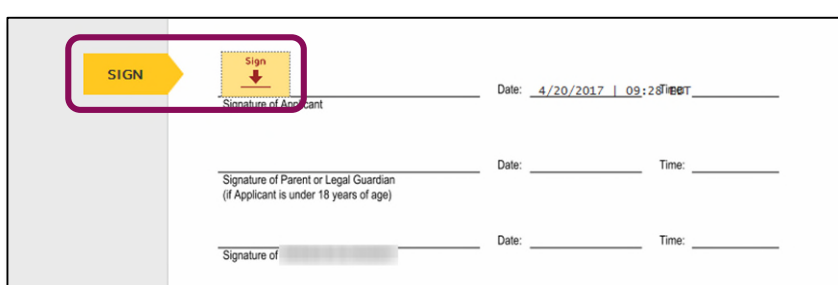
Step 4

Action	Screen
<p>To begin the process:</p> <ul style="list-style-type: none"> Select the Start button. 	

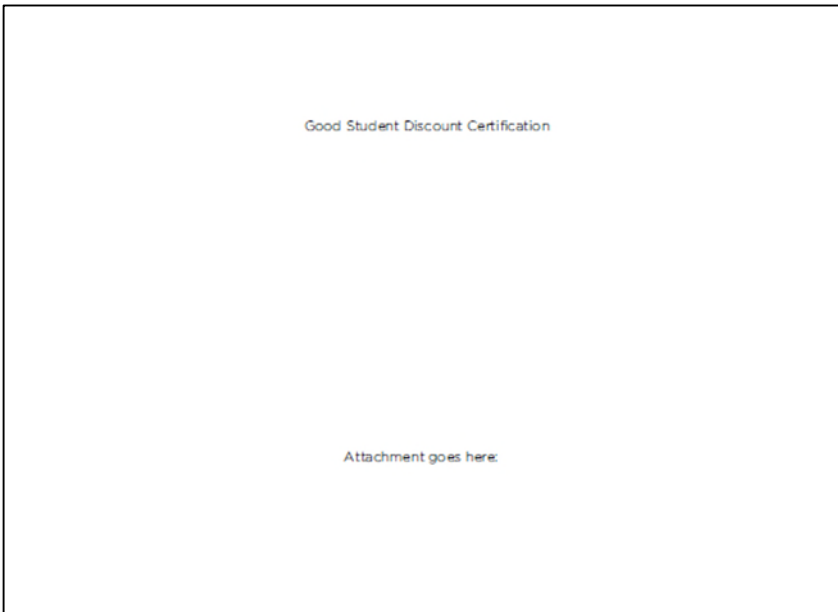
Step 5

Action	Screen
<p>While reviewing the documents, the Start button changes to Next.</p> <p>To continue viewing all documents in the eSignature file:</p> <ul style="list-style-type: none"> Select the Next button. 	

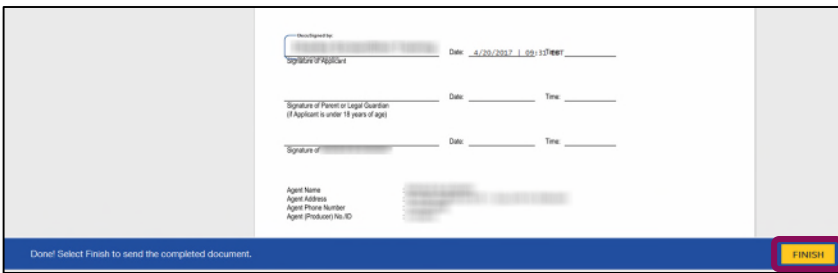
Step 6

Action	Screen
<p>An arrow and electronic flags display next to each area where eSignatures are required.</p> <p>“Signing” may be done through a computer email or mobile phone.</p> <p>To eSign:</p> <ul style="list-style-type: none"> Select or “draw” a signature. (Similar to signing at a retail store for a credit card payment.) 	

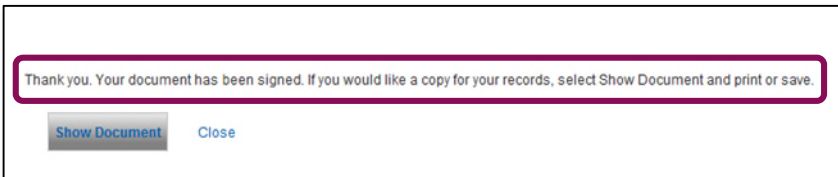
Step 7

Action	Screen
<p>If the customer is required to upload a document, such as Good Student Discount Certification, then a page in the eSignature envelope will populate.</p> <p>This document is only to serve as a placeholder for the required documentation the customer must upload.</p> <p>In the event the documentation is not received, the discount may be removed, or the policy may be cancelled.</p>	

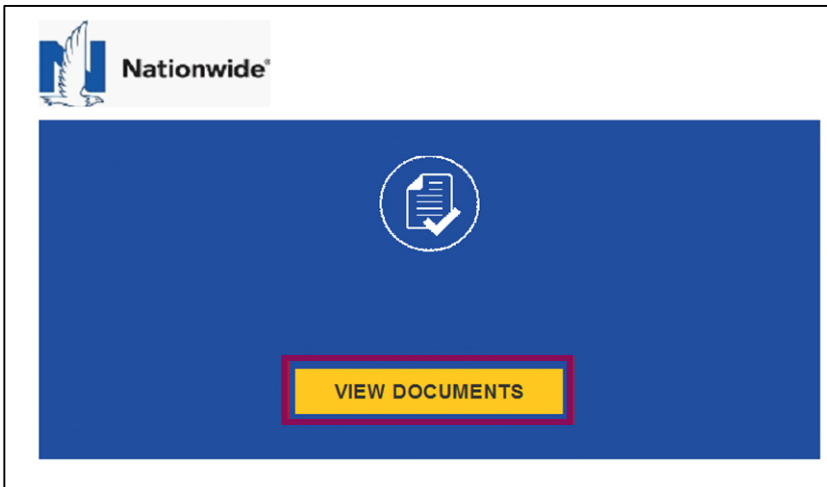
Step 8

Action	Screen
<p>This is an example of what the form looks like once signed.</p> <p>After e-signing all documents:</p> <ul style="list-style-type: none"> Select the Finish button to complete the process. 	

Step 9

Action	Screen
<p>Once Finish is selected, a <i>Thank You</i> message displays.</p>	

Step 10

Action	Screen
<p>Once all documents have been signed by all required signers, the Agent will receive an email stating the eSignature envelope has been completed.</p> <p>You can download or print the documents by selecting the View Documents button.</p>	

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.
- (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.
- (3) I acknowledge that: (i) certain information contained in this training presentation may be applicable to licensed individuals only and access to this information should not be construed as permission to perform any functions that would require a license; and (ii) I am responsible for acting in accordance with all applicable laws and regulations.
- (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.