

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.

Nationwide Documents/Email

Automate Electronic Delivery of Required Documents? * Yes No

Document Delivery Preference New Selection Online Account Access

Email Address * elizabeth@email.com

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.

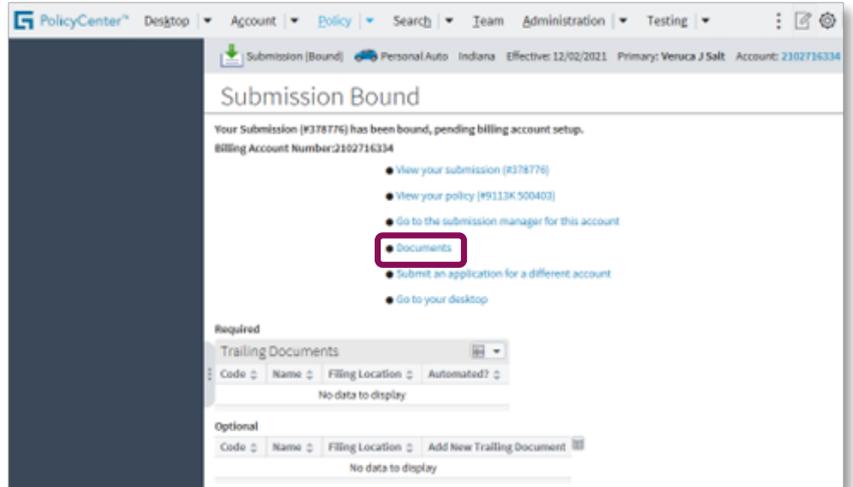
Step 1

Action

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

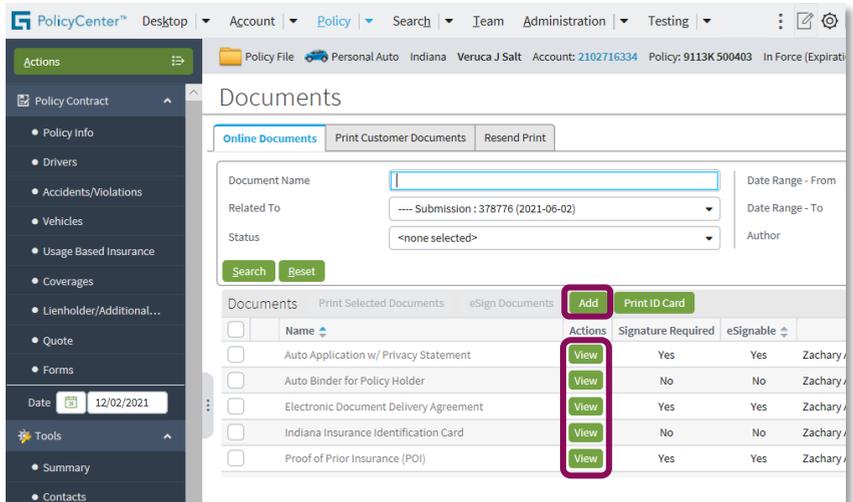
- Select the **Documents** link.

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

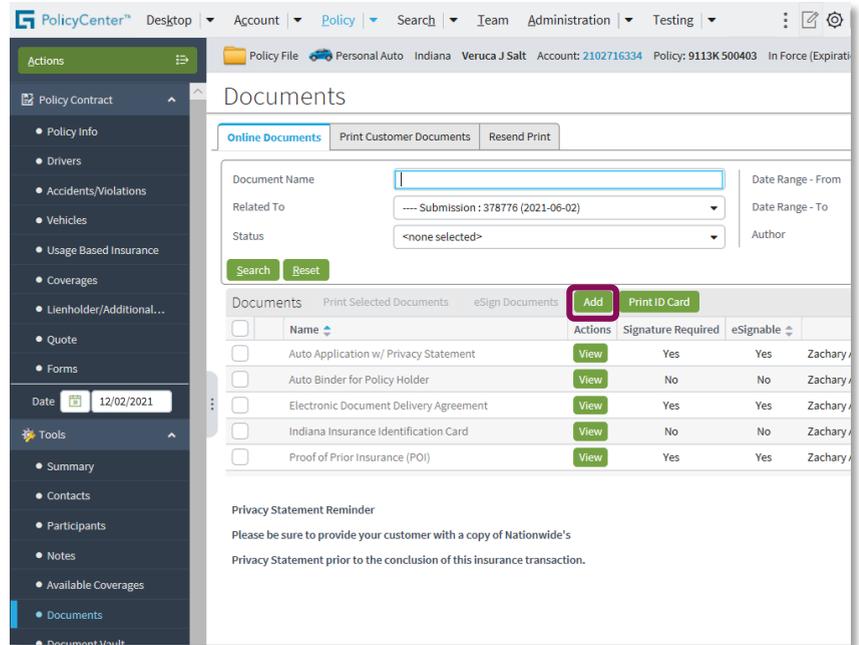
Action

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



Step 3

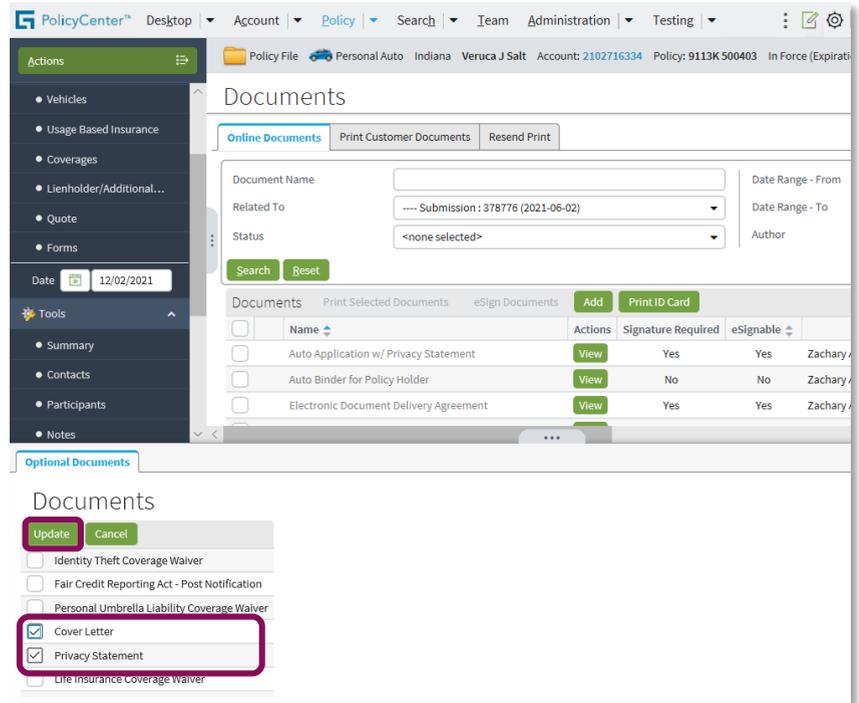
Action

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



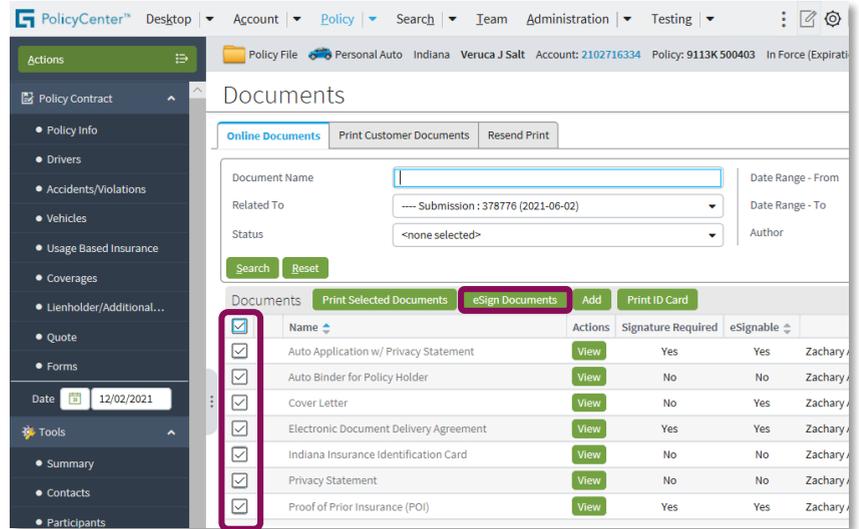
Step 4

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



Step 5

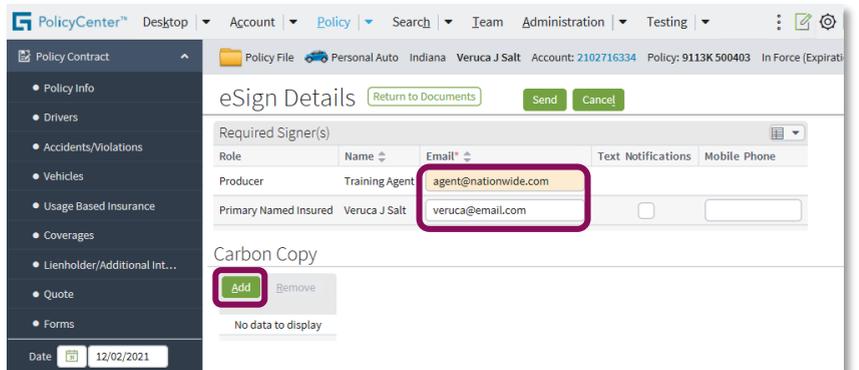
Action

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



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

The screenshot shows the 'eSign Details' screen in PolicyCenter. The 'Required Signer(s)' table has the following data:

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 checked="" type="checkbox"/>	555-555-1212

The 'Send' button is highlighted in red. The 'Text Notifications' checkbox and the 'Mobile Phone' field are also highlighted with a red box.

Step 7

Action	Screen																																																																																										
<p>An email and/or text message is sent to all recipients.</p> <p>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.</p> <p>Note: A status of <i>Created</i> 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.</p> <p>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 <i>Sent</i> to <i>Completed</i>.</p>	<table border="1"> <thead> <tr> <th>Name</th> <th>Actions</th> <th>Signature Required</th> <th>eSignable</th> <th>Author</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Auto Application w/ Privacy Statement</td> <td>View</td> <td>Yes</td> <td>Yes</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Auto Application w/ Privacy Statement</td> <td>View</td> <td>Yes</td> <td>Yes</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Auto Binder for Policy Holder</td> <td>View</td> <td>No</td> <td>No</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Auto Binder for Policy Holder</td> <td>View</td> <td>No</td> <td>No</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Cover Letter</td> <td>View</td> <td>No</td> <td>Yes</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Cover Letter</td> <td>View</td> <td>No</td> <td>Yes</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Electronic Document Delivery Agreement</td> <td>View</td> <td>No</td> <td>No</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Electronic Document Delivery Agreement</td> <td>View</td> <td>No</td> <td>No</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Indiana Insurance Identification Card</td> <td>View</td> <td>No</td> <td>No</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Indiana Insurance Identification Card</td> <td>View</td> <td>No</td> <td>No</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Privacy Statement</td> <td>View</td> <td>Yes</td> <td>Yes</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Privacy Statement</td> <td>View</td> <td>Yes</td> <td>Yes</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Proof of Prior Insurance (POI)</td> <td>View</td> <td>Yes</td> <td>Yes</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> <tr> <td>Proof of Prior Insurance (POI)</td> <td>View</td> <td>Yes</td> <td>Yes</td> <td>Zachary A Taylor</td> <td>Sent</td> </tr> </tbody> </table>	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
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