



# Paperless Registration

## About Paperless Registration

Registering for a nationwide.com account just got easier! Agents and customers will enjoy the simpler, more secure process to maintain paperless options.

There are 4 possible scenarios. Select a link to go to the scenario you need.

- [New Paperless Registration \(not registered on nationwide.com\)](#)
- [New Paperless Registration \(already registered, not signed up for paperless\)](#)
- [View/Update Existing Paperless Registration](#)
- [Online Registration Invitation](#)

## New Paperless Registration (not registered on nationwide.com)

1. From Client summary, Contact information tile, there are two possible starting places. Since the customer does not have an existing nationwide.com account, select the “Invite to self-service” link.

The screenshot shows the Nationwide Agent Center interface. At the top, there's a navigation bar with 'Agent Center' and 'Agent Name' dropdown. Below that are tabs for 'Personal', 'Commercial & Agribusiness', 'Billing & Claims', 'Agency', and 'Learning center'. A search bar is present with fields for 'Last name', 'First name (opt)', and 'ZIP (opt)', along with a 'Search' button and 'Clear fields' link. The main content area shows the 'Client summary' for Andrew Brown. There's a 'Back to Client search' link. The title is 'Client summary for Andrew Brown'. Below that are links for 'Contact info', 'Policies', 'Billing accounts', 'Claims', and 'Contact history'. The 'Andrew Brown' section has two main tiles: 'Contact information' and 'Associated clients'. The 'Contact information' tile shows 'Preferred address', 'Preferred phone', and 'Preferred email'. The 'Preferred email' field has a red box around the 'Invite to self-service' link. Below that is the 'Document delivery preference' section with the text 'Personal lines billing & policy documents: email (edit)'. The 'Associated clients' tile shows a table with columns 'Name', 'Gender', and 'Birth date'. Red arrows point from the 'Invite to self-service' link and the 'Document delivery preference' section to the label 'Starting places' at the bottom right.

Name	Gender	Birth date
Julie Brown	Female	12/12/1989
Anthony Smith	Male	12/12/1995
Carol Taylor	Female	1/2/2003
Julie Brown	Female	12/12/1989
Anthony Smith	Male	12/12/1995
Carol Taylor	Female	1/2/2003



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2. Because the customer does not have an online account, the delivery preference of “US mail” displays.

Personal Commercial & Agribusiness Billing & Claims Agency Learning center

Client search by Last name First name (opt) ZIP (opt)

Individual name Search Clear fields

Client summary / PL document delivery preference

### Edit personal lines document delivery preference for Andrew Brown

Select document delivery preference below:

Billing statements & policy documents ?

US mail

Email

Back

- a. Select the document delivery preference as “Email”.
- b. If there is an email on file, it will populate; if not, enter the customer’s email address.
- c. If the customer wants the invitation to register and create an account sent via:
  - i. Email – Select the “Email message” button; OR
  - ii. Text message – Select the “Text message” button, if there is a phone number on file, it will populate; if not, enter the mobile telephone number.
    - a) You must check the box indicating that the customer consents to a one-time text message. If the box isn’t checked, you will receive this message: Please confirm client consent.
- d. Click “Submit”.

Client summary / PL document delivery preference

### Edit personal lines document delivery preference for Andrew Brown

Select document delivery preference below:

Billing statements & policy documents ?

US mail

**a**  Email

Email address

**b** customer@customer.com

Send an invitation to the client to create an online account and complete registration:

Email message **c. i**

Text message

**OR**

Email message

Text message **c. ii**

Mobile telephone number

(614) 555-5555

**c. ii. a)**  The client consents to a one-time text message regarding online account registration.

Back Submit **d**

3. A confirmation message displays on the client summary screen.

You successfully signed up a customer for paperless policy and billing documents. An invitation to create a Nationwide.com account has been sent to 614-555-5555. If the client does not create an account in 29 calendar days, they will lose the paperless discount, if applicable.





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## New Paperless Registration (already registered, not signed up for paperless)

1. From Client summary, Contact information tile, select the “edit” link under “Document delivery preferences”.

Client summary for Andrew Brown

Jump to: [Contact info](#) | [Policies](#) | [Billing accounts](#) | [Claims](#) | [Contact history](#)

Andrew Brown

**Contact information**

Preferred address  
Street Address  
City, State  
Zip code

Preferred phone  
123-456-7890

Preferred email  
emailaddress@yahoo.com

**Document delivery preference**  
Personal lines billing & policy documents: email [\(edit\)](#)

**Associated clients**

Name	Gender	Birth date
Julie Brown	Female	12/12/1989
Anthony Smith	Male	12/12/1995
Carol Taylor	Female	1/2/2003
Julie Brown	Female	12/12/1989
Anthony Smith	Male	12/12/1995
Carol Taylor	Female	1/2/2003

2. The current preference displays. To change the document delivery preference, click the “Email” button.

Client summary / PL document delivery preference

### Edit personal lines document delivery preference for Andrew Brown

Select document delivery preference below:

Billing statements & policy documents ?

US mail

Email

[Back](#)

3. The email address is not editable on this screen. Click “Submit”.

Client summary / PL document delivery preference

### Edit personal lines document delivery preference for Andrew Brown

Select document delivery preference below:

Billing statements & policy documents ?

US mail

Email

Email address  
customer@customer.com

**i** An email address associated with an online account may be updated by a customer through nationwide.com or by contacting the Service Center.

[Back](#) [Submit](#)





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4. A Confirmation message displays.

✔ You successfully signed up a customer for paperless policy and billing documents.

5. Inform the customer that they need to log in to nationwide.com and agree to the Electronic Services and Document Delivery Agreement.

⚠ Please inform the customer that they need to log in to Nationwide.com and agree to the Electronic Services and Document Delivery Agreement. They will be automatically prompted to acknowledge the agreement next time they log in.

## View/Update Existing Paperless Registration

1. From Client summary, Contact information tile, select the “edit” link under “Document delivery preferences”.

Client summary for Andrew Brown

Jump to: [Contact info](#) | [Policies](#) | [Billing accounts](#) | [Claims](#) | [Contact history](#)

Andrew Brown

**Contact information**

**Preferred address**  
Street Address  
City, State  
Zip code

**Preferred phone**  
123-456-7890

**Preferred email**  
emailaddress@yahoo.com

**Document delivery preference**  
Personal lines billing & policy documents: email edit

**Associated clients**

Name	Gender	Birth date
Jane Brown	Female	12/12/1989
Anthony Smith	Male	12/12/1995
Carol Taylor	Female	1/2/2003
Jane Brown	Female	12/12/1989
Anthony Smith	Male	12/12/1995
Carol Taylor	Female	1/2/2003

2. The current preference displays. The email address is not editable on this screen. To change the document delivery preference, click the “US mail” button.

Client summary / PL document delivery preference

### Edit personal lines document delivery preference for Andrew Brown

Select document delivery preference below:

**Billing statements & policy documents** ?

US mail

Email

Email address  
customer@customer.com

**i** An email address associated with an online account may be updated by a customer through nationwide.com or by contacting the Service Center.

Back
Submit





# Paperless Registration

3. Click "Submit".

Client summary / PL document delivery preference

### Edit personal lines document delivery preference for Andrew Brown

Select document delivery preference below:

Billing statements & policy documents <sup>?</sup>

US mail

Email

[Back](#) [Submit](#)

4. A confirmation message displays.

You successfully changed the client's personal lines paperless billing and policy documents preference to US mail.

## Online Registration Invitation

1. From Client summary, Contact information tile, select the "Invite to self-service" link.

Client summary

< Back to Client search

### Client summary for Andrew Brown

Jump to: [Contact info](#) | [Policies](#) | [Billing accounts](#) | [Claims](#) | [Contact history](#)

Andrew Brown

**Contact information**

Preferred address  
Street Address  
City, State  
Zip code

Preferred phone  
123-456-7890

Preferred email  
emailaddress@yahoo.com

[invite to self-service](#)

Document delivery preference  
Personal lines billing & policy documents: email [\(edit\)](#)

**Associated clients**

Name	Gender	Birth date
Julie Brown	Female	12/12/1989
Anthony Smith	Male	12/12/1995
Carol Smith	Female	1/2/2003
Julie Brown	Female	12/12/1989
Anthony Smith	Male	12/12/1995
Carol Smith	Female	1/2/2003

### Email Invitation

2. Select the "Email message" button for the customer to receive the invitation via email. If there is an email on file, it will populate; if not, enter the customer's email address.
3. Click "Submit".

Client summary / Online account invitation

1800-4-393-07

### Send an online account invitation to Andrew Brown

With an account on nationwide.com, a customer can:

- View policy documents
- Make payments and see billing statements
- Set up automatic payments
- Enroll in paperless options
- Change an address
- Complete select policy changes
- File & view claims
- Enroll in texting and email reminders

Select how the client should receive the invitation

Email message

Email address  
customer@customer.com

Text message

[Back](#) [Submit](#)





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## Text Invitation

4. Select the “Text message” button for the customer to receive the invitation via text. If there is a phone number on file, it will populate; if not, enter the customer’s phone number.

Client summary / Online account invitation

### Send an online account invitation to Andrew Brown

**i** With an account on nationwide.com, a customer can:

- View policy documents
- Make payments and see billing statements
- Set up automatic payments
- Enroll in paperless options
- Change an address
- Complete select policy changes
- File & view claims
- Enroll in texting and email reminders

Select how the client should receive the invitation

Email message

Text message

Mobile telephone number

(614) 555-5555

The client consents to a one-time text message regarding online account registration.

Back

5. You must check the box indicating that the customer consents to a one-time text message. If the box isn’t checked, an error message displays.
6. Click “Submit”.

Select how the client should receive the invitation

Email message

Text message

Mobile telephone number

(614) 555-5555

**i** Please confirm client consent.

The client consents to a one-time text message regarding online account registration.

Back Submit

7. A confirmation message displays.

An invitation to create a Nationwide.com account has been sent to 614-555-5555.

