About Paperless Registration

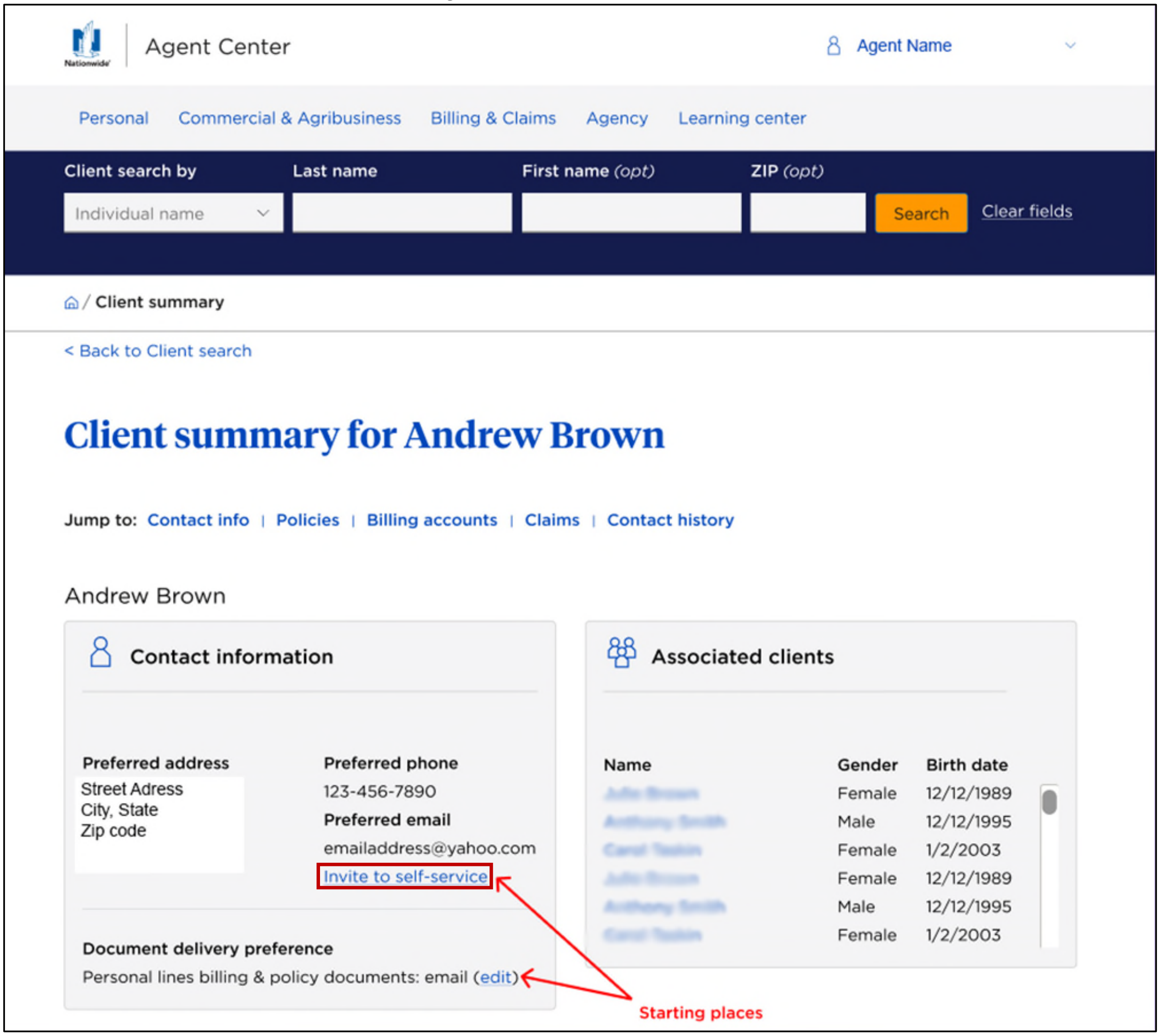
Registering for a nationwide.com account just got easier! Agents and customers will enjoy the simpler, more secure process to maintain paperless options.

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

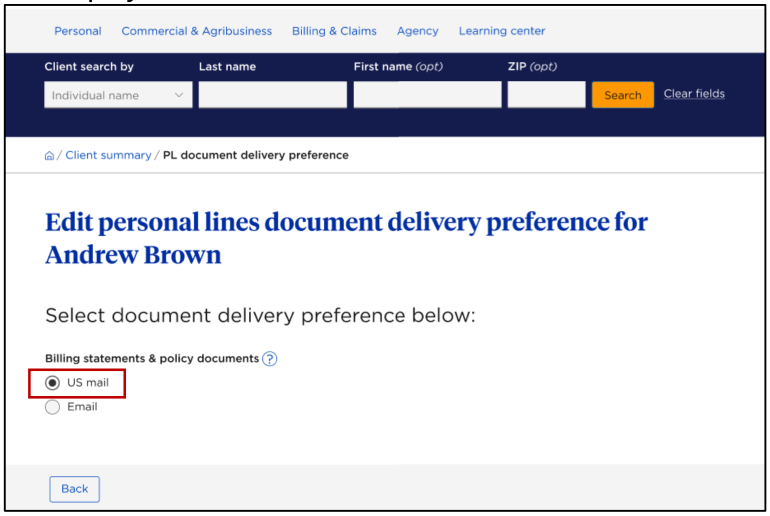
- New Paperless Registration (not registered on nationwide.com)
- New Paperless Registration (already registered, not signed up for paperless)
- View/Update Existing Paperless Registration
- Online Registration Invitation

New Paperless Registration (not registered on nationwide.com)

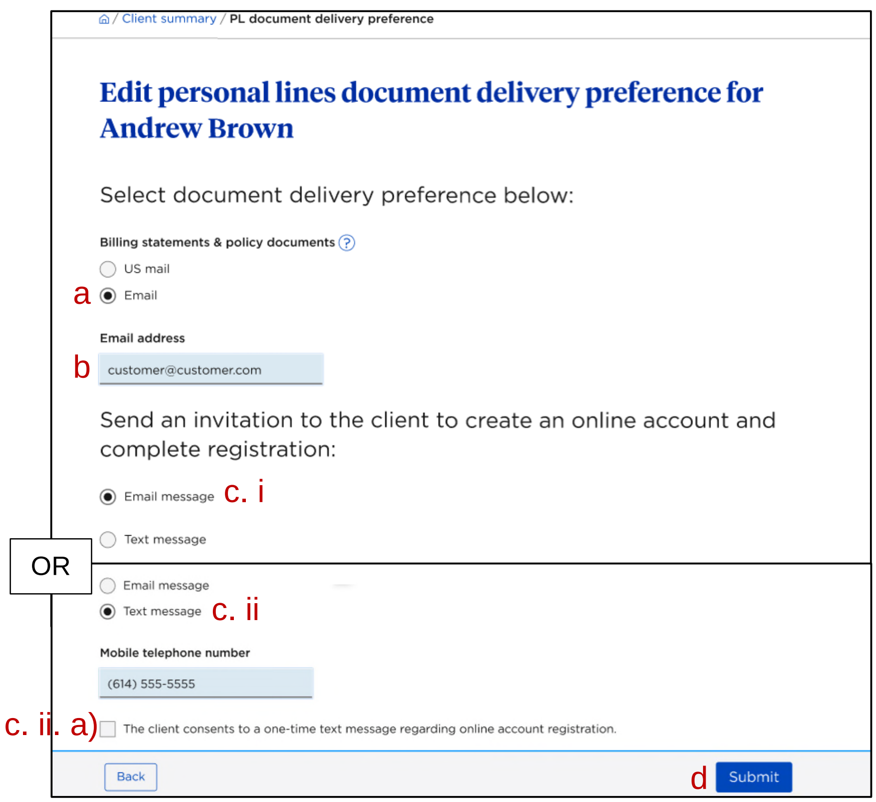
1. From Client summary, Contact information tile, there are two possible starting places. Since the customer does not have an existing nationwide.com account, select the “Invite to self-service” link.



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



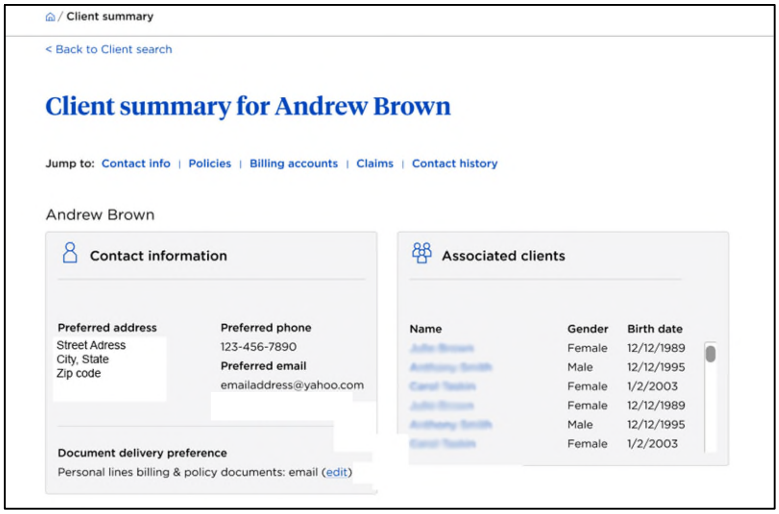
a. Select the document delivery preference as “Email”.
b. If there is an email on file, it will populate; if not, enter the customer’s email address.
c. If the customer wants the invitation to register and create an account sent via:
    i. Email – Select the “Email message” button; OR
    ii. Text message – 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”.



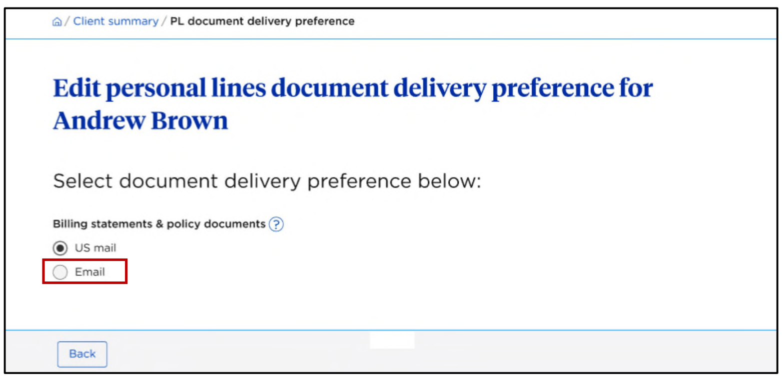
3. A confirmation message displays on the client summary screen.

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

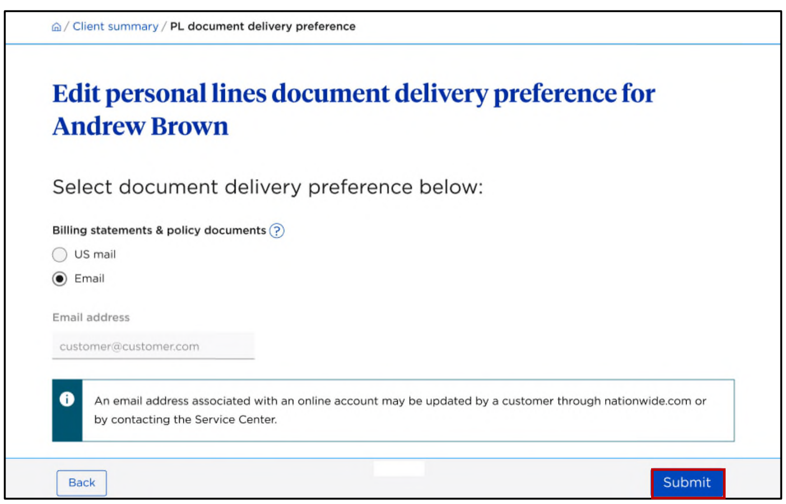
1. From Client summary, Contact information tile, select the “edit” link under “Document delivery preferences”.



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



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



4. A Confirmation message displays.

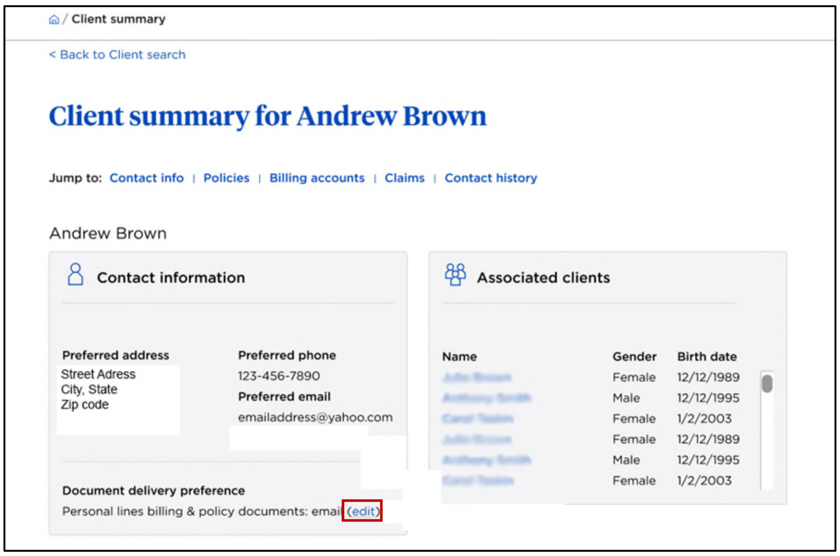
> You successfully signed up a customer for paperless policy and billing documents.

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

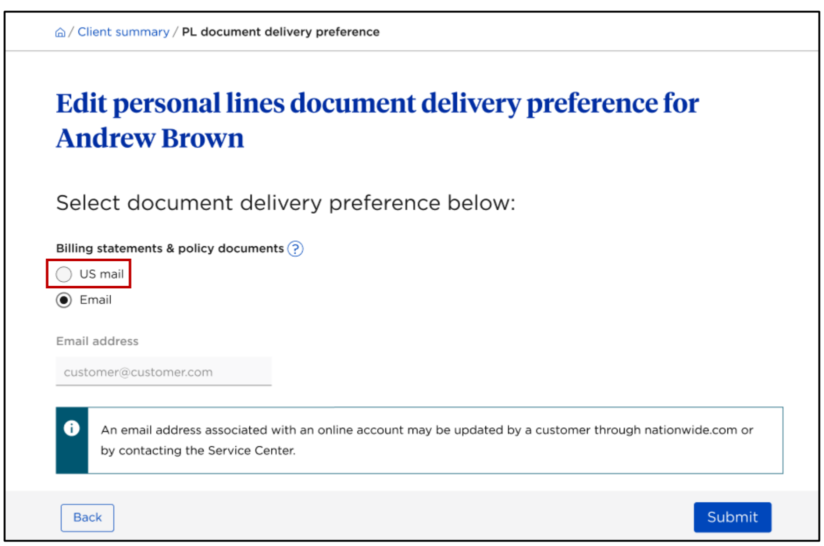
> Please inform the customer that they need to log in to Nationwide.com and agree to the Electronic Services and Document Delivery Agreement. They will be automatically prompted to acknowledge the agreement next time they log in.

View/Update Existing Paperless Registration

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

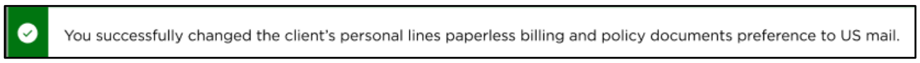


2. The current preference displays. The email address is not editable on this screen. To change the document delivery preference, click the “US mail” button.



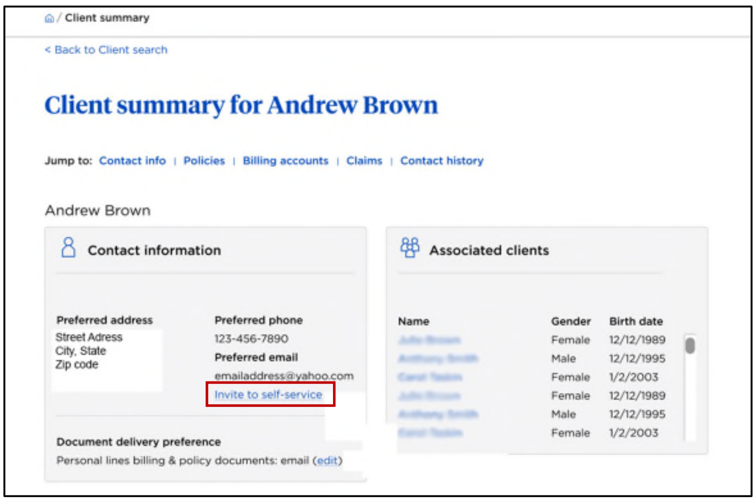
3. Click “Submit”.

4. A confirmation message displays.



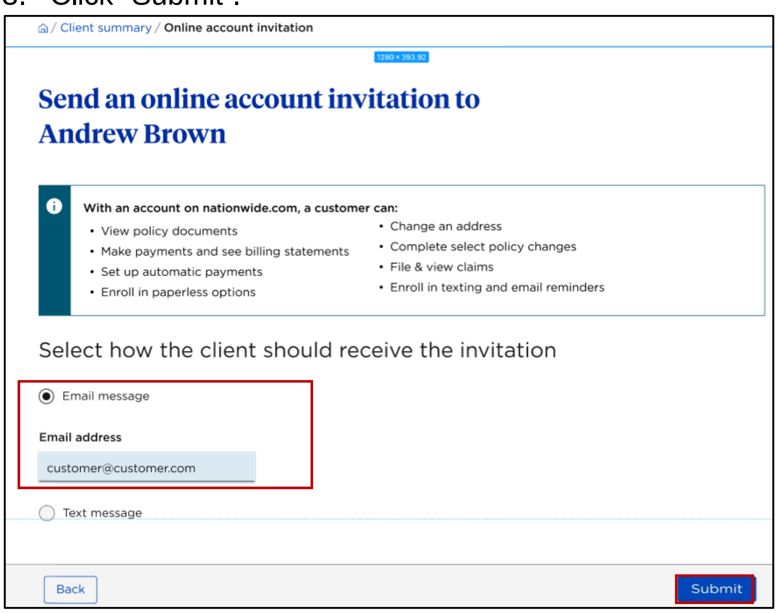
Online Registration Invitation

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



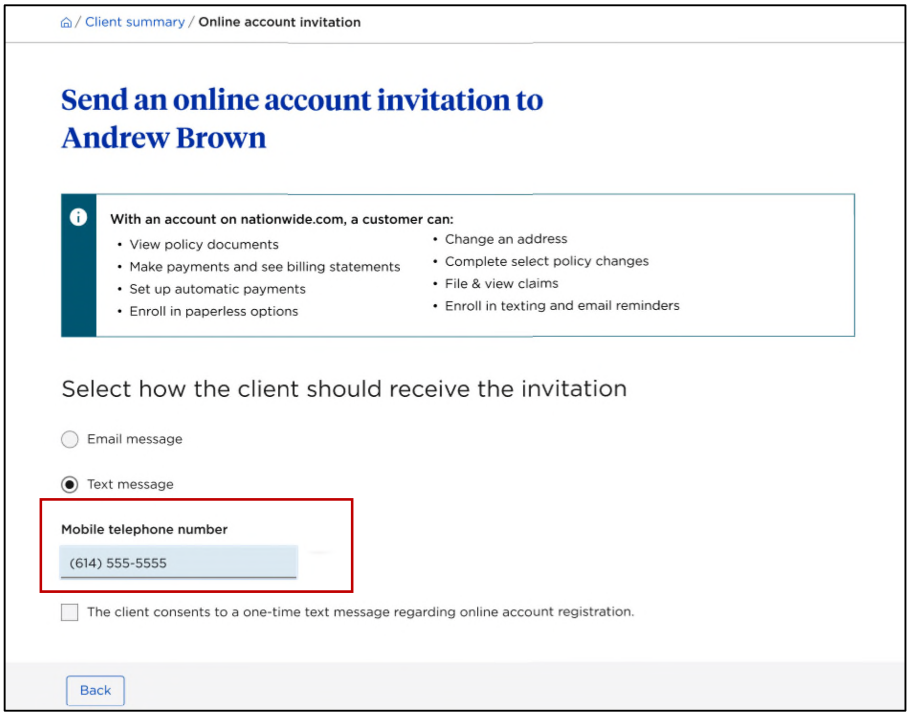
<u>Email Invitation</u>

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”.



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.



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”.

7. A confirmation message displays.