Paperless Selection Update – Point of Sale/Service

Beginning 12/3/2021, all new business policies will default to paperless at point of sale. This means you as the agent will be required to enter the customer email address before issuing.

Why the change?

Many Commercial and Farm customers choose paperless in their personal lives. Paperless places documents in their hands quickly and is environmentally friendly. Why not make it just as easy for them to adopt paperless at work? We have updated our systems to do just that.

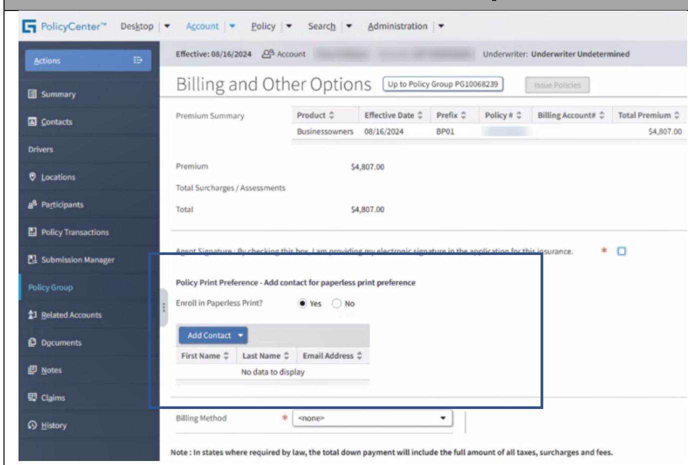
• Point of Sale: Our systems now default to paperless, requiring a name and email. This creates a temporary online account.

• Point of Service: We will offer paperless with the new ability to initiate the process for them.

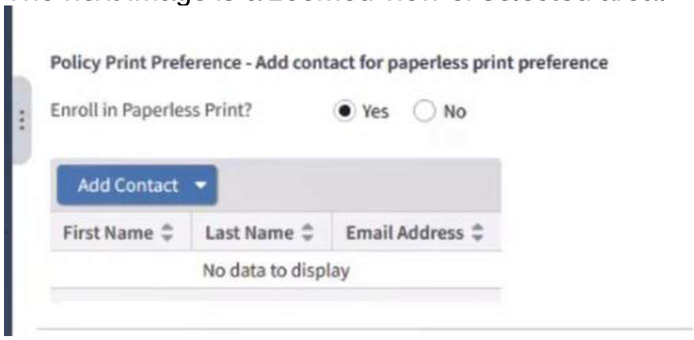
• Documents can still be printed at their request.

This document will outline the paperless process.

Update at Point of Sale



The next image is a zoomed view of selected area.

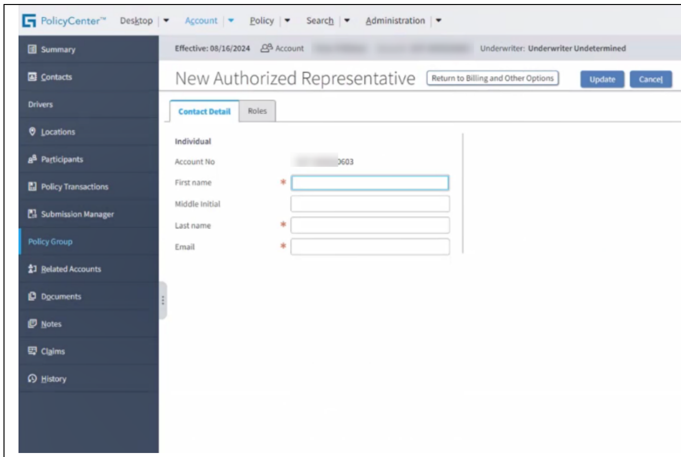


In Policy Center, during the new business process, on the Billing and Other Options screen you will complete the Policy Print Preference. Here the system will ask you to add a contact for paperless print.

Note the preference is preset to **Yes.** This is the preferred option.

Click “Add Contact” to update the required contact information.

Paperless Selection Update – Point of Sale/Service

<table>
<tr>
<td>
</td>
<td>Once Add Contact is selected, the New Authorized Representative screen will appear.

Here you will enter the required information.
First Name
Last Name
Email address
Once the required information is entered, select update in the upper right-hand corner of the screen.

This will take you back to the Billing and Other Options screen to continue to the next step of binding the policy. Once complete, the victory screen will display.</td>
</tr>
<tr>
<td colspan="2">What happens next?
Additional details on what the customer will see/receive.</td>
</tr>
<tr>
<td><u>CUSTOMERS WITHOUT A NATIONWIDE.COM ACCOUNT</u></td>
<td>Once you have entered the contact information for the customer the system will check to see if an online account exists for the user. If no account exists, the system will setup up a temporary account and send the user an email.

The email will provide them a temporary password allowing them to log in and complete their online account.</td>
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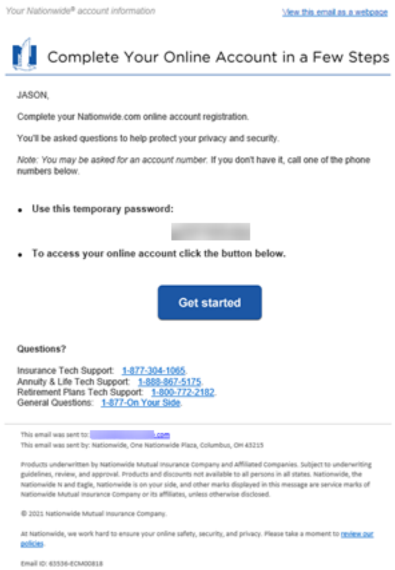
Your Nationwide® account information
View this email as a webpage
Complete Your Online Account in a Few Steps
JASON,
Complete your Nationwide.com online account registration.
You'll be asked questions to help protect your privacy and security.
Note: You may be asked for an account number. If you don't have it, call one of the phone numbers below.
• Use this temporary password:
• To access your online account click the button below.
Get started
Questions?
Insurance Tech Support: 1-877-304-1065.
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Retirement Plans Tech Support: 1-800-772-2182.
General Questions: 1-877-On Your Side.
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At Nationwide, we work hard to ensure your online safety, security, and privacy. Please take a moment to review our policies.
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Email Sample
</td>
<td>
Clicking the Get started button will take the customer directly to the Nationwide website.

To begin, the customer will enter the email address they provided, and the temporary password received from Nationwide.
</td>
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<tr>
<td>Setting Expectations with the Customer</td>
<td>
The customer will then follow the prompts to complete registration. To prepare them they are required to enter the following personal information.

• First and Last Name
• DOB
• Zip code
• Phone or Email for contact
• Policy number

Selecting continue at this point will direct them to create their user id and new password to replace the temporary one provided.

Use of their email address as the user ID is recommended, to simplify the process.

Once they have selected account details the system will confirm contact information for security.
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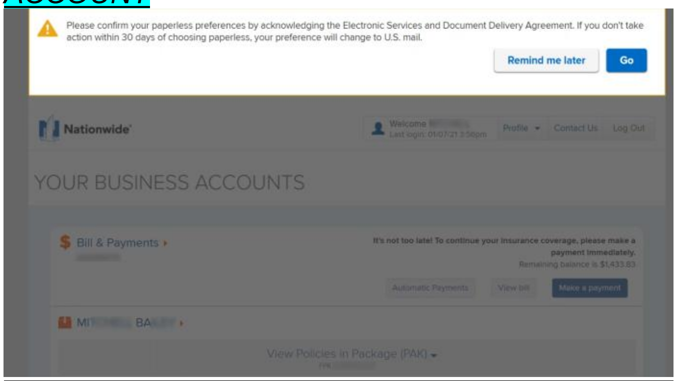
<table>
<tr><td></td><td>During this process the customer must agree to the Electronic Services and Document Delivery Agreement (otherwise known as ESDDA) consent. This electronic document agreement is required to continue paperless.

Note: In addition to the account setup email the customer will receive a second email notifying them their paperless preference has changed. This email does not require response.</td></tr>
<tr><td>Account Setup Reminder Messages</td><td>If the customer does not respond to the request to set up their account. They will receive a reminder at the 15-day mark.

If they have not set up their account at 30 days, the system will default them back to paper prints.</td></tr>
<tr><td><u>CUSTOMERS WITH A NATIONWIDE.COM ACCOUNT</u>

</td><td>If the customer already has a Nationwide.com they will only receive an email their paperless preference has changed as they do not need a temporary account.

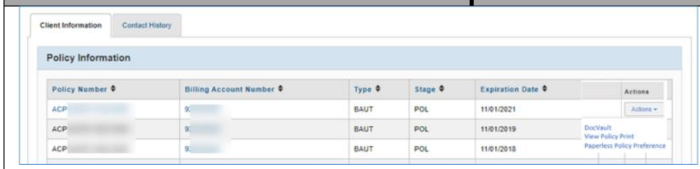
When they log into their account a pop up will appear to acknowledge Electronic Services and Document Delivery (ESDDA). As stated, this is required to remain on paperless.</td></tr>
<tr><th colspan="2">Update at Point of Service</th></tr>
<tr><td>

Image 1</td><td>Any existing policy can go paperless via Agent Center. A convenient way to get to that field is through the Client Information tab. (Image 1)

In the Actions drop-down, select Paperless Policy Edit. This will take</td></tr>
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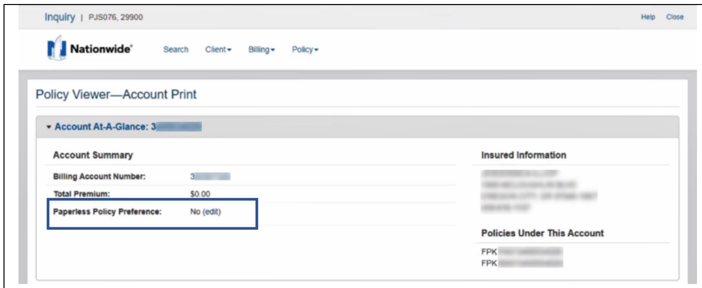
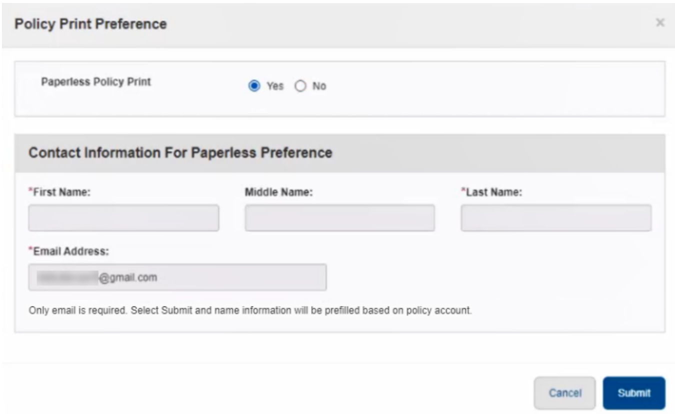
 Image 2  Image 3	you to the Account Print page. (Image 2) The "Paperless Policy Preference" field can be changed to Yes or No by selecting "edit." If the commercial business entity type is Individual, only an email address is collected. If the commercial business entity is anything other than Individual, you will need to enter a first and last name for the account controller. (Image 3) Note- If the contact information is prefilled, you CANNOT make changes. The customer, however, can make that change online. Once updated the customer will receive the emails, as required, outlined above.
	Any updates you make to paperless policy will display in Agent Center Contact History.
Decline Paperless	If the customer declines paperless you can select no. If they would like to change this selection in the future use Agent Center to update (see after the sale).
Important! Advocate for paperless policy preferences during new business sales and at point-of-service moments. Encouraging members to opt-in and providing email information allows for the members to have quick access to the most up to date information.	