How to Review and Print Documents



PolicyCenter

Description

This job aid describes how to review and print policy documents in PolicyCenter.

There are four print options to print documents in PolicyCenter:

- *Online Documents* allows you to print documents related to a specific transaction (Submission, Renewal, Policy Change)
- Policy Documents (Date Range) allows you to print documents from a specific date range
- Policy Documents (As of Date) allows you to print documents from a specific date
- Resend Print allows for the option to request documents be mailed directly to the customer and/or additional interest. For example, when a customer requests a hard copy of their ID cards or declaration page be mailed to them.

IMPORTANT NOTE: PolicyCenter will automatically send out required documents if an email address is present and "Yes" is selected in the "Automated Electronic Delivery of Required Documents" field on the "Policy Info" screen.

- The system will default to "Yes" and the customer's email address will be populated if available
- If the email address is not available, the system will require you to enter one to continue
- Select "No" on the "Policy Info" screen to manually send out required documents in the customer's preferred method

Select the appropriate link to advance to the desired printing procedure:

- Online Documents
- Policy Documents (Date Range)
- Policy Documents (As of Date)
- Resend Print

By accepting a copy of these materials:

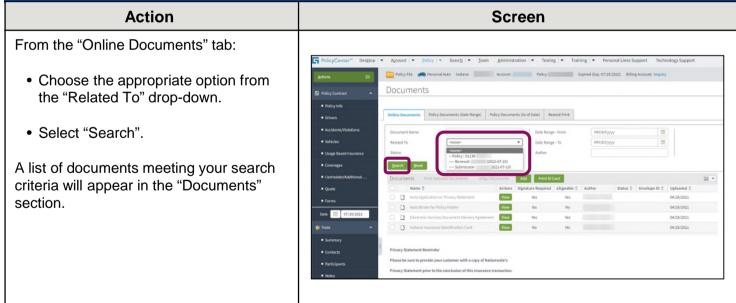
- (1) I agree that I am either: (a) an employee or Contractor working for Nationwide Mutual Insurance Company or one of its affiliates or subsidiaries ("Nationwide"); or (b) an Independent Sales Agent who has a contract and valid appointment with Nationwide; or (c) an employee of or an independent contractor 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.



Online Documents

Action Once you have a policy open, navigate to the "Documents" screen. From the "Documents" screen: Select the "Online Documents" tab. **Select the "Online Documents" tab.** **The Action Screen Scree

Step 2





Online Documents, continued

Step 3

Action Screen

To print a document:

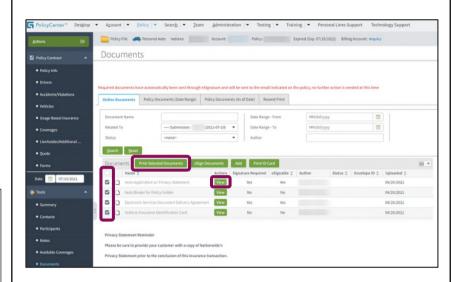
- Place a checkmark in the box next to the document you wish to print.
 Select the "All" checkbox if you'd like to print all the documents related to the event.
- Select "Print Selected Documents".



If the customer is already set-up on Automated Electronic Delivery, you will see the statement at the top of the screen. You will also be given a download of the documents selected to print.

To review a document:

 Select the green "View" button next to the name of the document you wish to review.





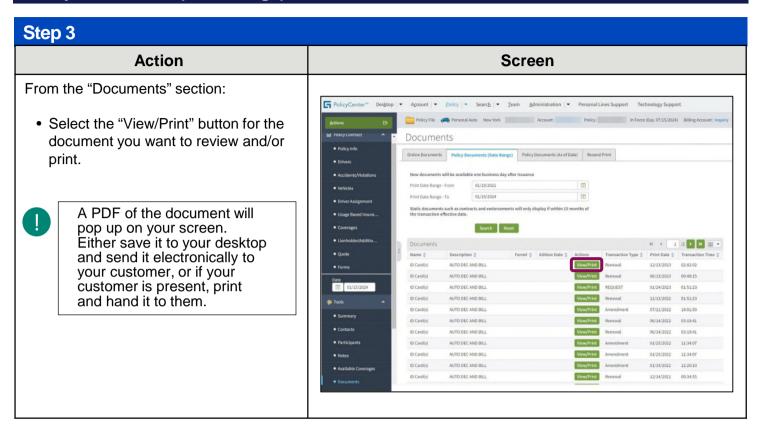
Policy Documents (Date Range)

Step 1 **Action** Screen Once you have a policy open, navigate to F PolicyCenter" Design Folicy Agrount Policy Search Ieam Administration Personal Lines Support Technology Support the "Documents" screen. Documents From the "Documents" screen: Select the "Policy Documents (Date Print Date Range - From Range)" tab. Print Date Range - To 01/19/2014 Search Reset et e 1 /2 > 30 III + View/Frint Renewal View/Print Renewal AUTO DEC AND BILL 00/11/2023 00:48:15 AUTO DEC AND BILL View/Print REQUEST ID Cardis) 01/24/2023 01:51:23 ID Cardisi AUTO DEC AND BILL 12/13/2022 01:51:23 ID Card(s) AUTO DEC AND BILL 01/25/2022 11:34:07 ID Cardisi AUTO DEC AND BILL 01/25/2022 11:34:07 AUTO DEC AND BILL 01/19/2022 Step 2 **Action** Screen On the "Documents" screen: • Select "Policy Documents (Date Documents Range)". • Enter the desired date range search criteria. Print Date Range - Te AUTO DEC AND BILL View/Frint Renewal 06/13/2023 00:48:15 ID Card(s) View/Print HEQUEST 01:51:23 D Card(s) AUTO DEC AND BILL 01/24/2023

12/13/2022 01:51:23



Policy Documents (Date Range), continued





Policy Documents (As of Date)

Step 2	
Action	Screen
From the "Policy Documents (As of Date)" tab: • Select the "Print As of Date". • Select "Search". A list of documents meeting your search criteria will appear in the "Documents" section.	Principle DOCUMENS



Policy Documents (As of Date), continued

Step 3

Action Screen

To print a document:

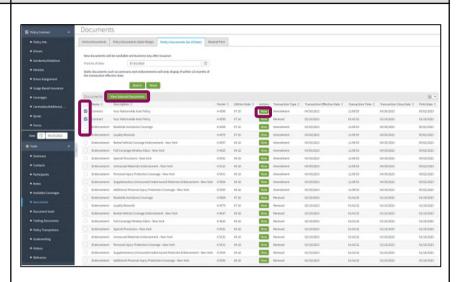
- Place a checkmark in the box next to the document you wish to print.
 Select the "All" checkbox if you'd like to print all the documents related to the specific "as of" date.
- Select "View Selected Documents".



A PDF will download. You can either save the document and email it to your customer or print it and hand it to your customer.

To review a document:

- Follow the same steps above for "To print a document" without printing the document.
- Select the green "View" button next to the name of the document you wish to review.





Resend Print

Step 1 **Action** Screen Once you have a policy open, navigate to the "Documents" screen. From the "Documents" screen: • Select the "Resend Print" tab. Step 2 **Action** Screen From the "Resend Print" tab: Select all the documents being requested. · Select "Resend".



Resend Print, continued

