

Contingencies & eSignature

Commercial Lines (PolicyCenter® Policies)

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Contingencies, or Additional Underwriting Requirements as they are also referred to, are primarily trailing documents and are triggered when additional information such as a trailing document is needed based on Underwriting Rules, State requirements, and other general underwriting requirements.





If there are one or more contingencies on a newly-issued account, **Contingency Detail Messaging** will appear on the Account Successfully Issued screen.

There are three types of Contingencies for PolicyCenter policies: **Print**, **No Print**, and **Activity Only**.

The screenshot shows the 'Account Successfully Issued' page. At the top, it says 'Your Policy Group has been issued. Start eSignature to email all eligible documents to Insured for'. Below this is a list of links: 'Print Mail Page and PAKSUM', 'Print ACP CPC', 'Print Down Payment Submittal Form', 'Print Flex Chek Authorization Form', and 'Print Application'. A message states 'Clicking the following links will navigate you away from this page.' followed by 'Start eSignature', 'View your Policy Group', 'Go to the submissions manager for this account', and 'Go to your desktop'. At the bottom, a green-bordered box highlights the 'Contingency Detail Messaging' section, which contains the text: 'CP01 - MN - A completed and signed Minnesota Coinsurance must be provided to the company.'



A **Print Contingency** is a form that requires a signature or needs additional information to be completed.

Examples include:

- PIP Forms
- UM/UIM Forms
- Driver Exclusion Forms
- Mine Subsidence
- WC Inclusion/Exclusion Forms





Print Contingencies will appear on the Account Successfully Issued screen when you issue a new policy; be sure to print prior to clicking eSignature or any of the other links that will navigate you away from this screen.

Account Successfully Issued

Your Policy Group has been issued. Start eSignature to email all eligible documents to Insured for

- Print Mail Page and PAKSUM
- Print ACP CPC
- Print Down Payment Submittal Form
- Print Flex Chek Authorization Form
- Print Application

Clicking the following links will navigate you away from this page.

- Start eSignature
- View your Policy Group
- Go to the submissions manager for this account
- Go to your desktop

Contingency Detail Messaging

CP01 - MN - A completed and signed Minnesota Coinsurance must be provided to the company.

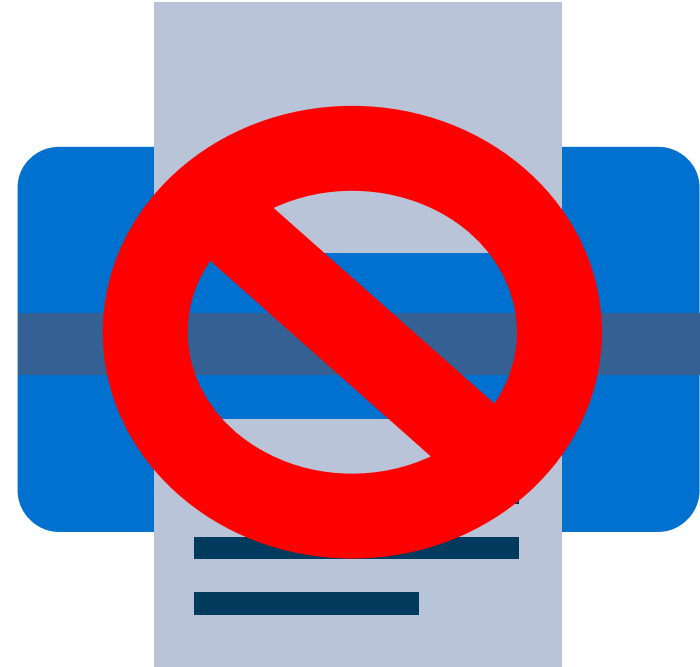
Contingencies

Title	Product	Prefix	Action
Coinsurance	CP7 Commercial Property	CP01	<button>Print</button>

A **No Print Contingency** is a document that is required but does not need a signature or additional information to be completed.

Examples include:

- Loss Runs
- Lead Liability Certificate
- Workplace Safety Credit
- Drug Free Workplace Credit





An **Activity Only Contingency** is a post-issuance document or filing that requires completion by an internal associate. These are documents that require us as a company to complete information for the insured.

Examples include:

- Liquor Certificates
- Motor Carrier Filings





Great news! Some of the more frequently-used trailing documents sent to customers for PolicyCenter policies are becoming more streamlined and automated.

eSignature will be enabled on certain trailing documents by adding DocuSign tags for signature and data entry. This is a big win because it will make it more convenient for new and existing customers to sign and return required documentation.





Here's how to start the eSignature process:

1. Once you have issued the policy and see the Account Successfully Issued screen, click "Start eSignature."

Be sure to print any needed forms from this page prior to starting eSignature; once you start eSignature the system will not return to this page.

PolicyCenter™ Desktop Account Policy Search Administration

Account Successfully Issued

Your Policy Group has been issued. Start eSignature to email all eligible documents to Insured for electronic signature. Otherwise print application and contingency documents for signature.

- Print Mail Page and PAKSUM
- Print ACP
- Print Down Payment Submittal Form
- Print Flex Chek Authorization Form
- Print Application

Clicking the following links will navigate you away from this page.

- Start eSignature
- View your Policy Group
- Go to the submissions manager for this account
- Go to your desktop

Contingency Detail Messaging

BP01 - IL Location 1, Building 1 - A completed and signed NI-0065, must be provided to the company.

Title	Product	Prefix	Action
Mine Subsidence	Businessowners	BP01	Print



This will take you to the Account File Documents screen.

2. Check the radio button next to the document that you will be sending to the customer for eSignature.

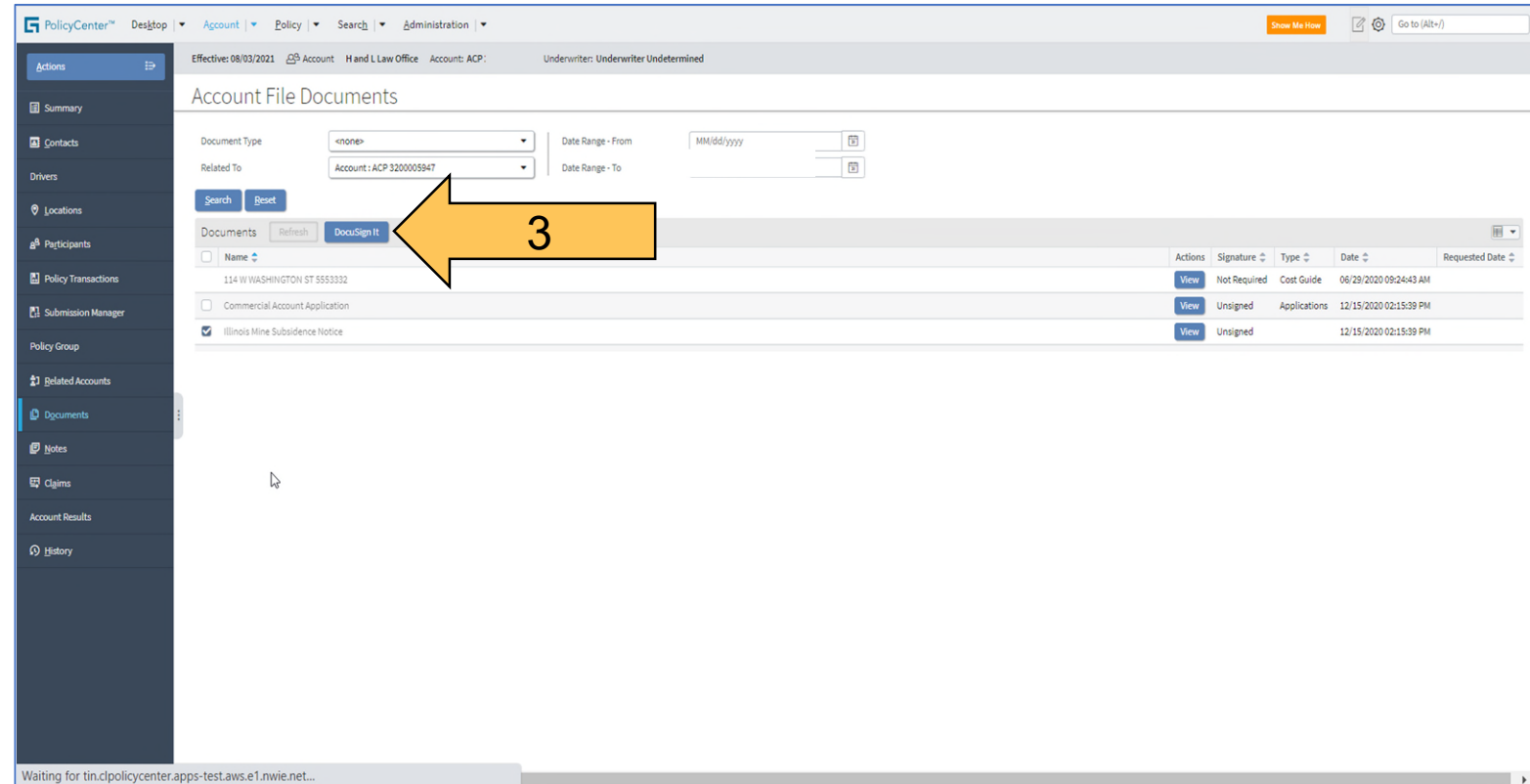
The DocuSign It button will be grayed out until you select a document for eSignature.

The screenshot shows the 'Account File Documents' interface in PolicyCenter. The left sidebar contains a navigation menu with options like Summary, Contacts, Drivers, Locations, Participants, Policy Transactions, Submission Manager, Policy Group, Related Accounts, Documents, Notes, Claims, Account Results, and History. The main area displays a list of documents for account ACP 3200005947. The 'Illinois Mine Subsidence Notice' is selected, and a yellow arrow with the number '2' points to its selection radio button. The 'DocuSign It' button is disabled (grayed out).

Name	Actions	Signature	Type	Date	Requested Date
114 W WASHINGTON ST 5553332	View	Not Required	Cost Guide	06/29/2020 09:24:43 AM	
Commercial Account Application	View	Unsigned	Applications	12/15/2020 02:15:39 PM	
<input checked="" type="checkbox"/> Illinois Mine Subsidence Notice	View	Unsigned		12/15/2020 02:15:39 PM	

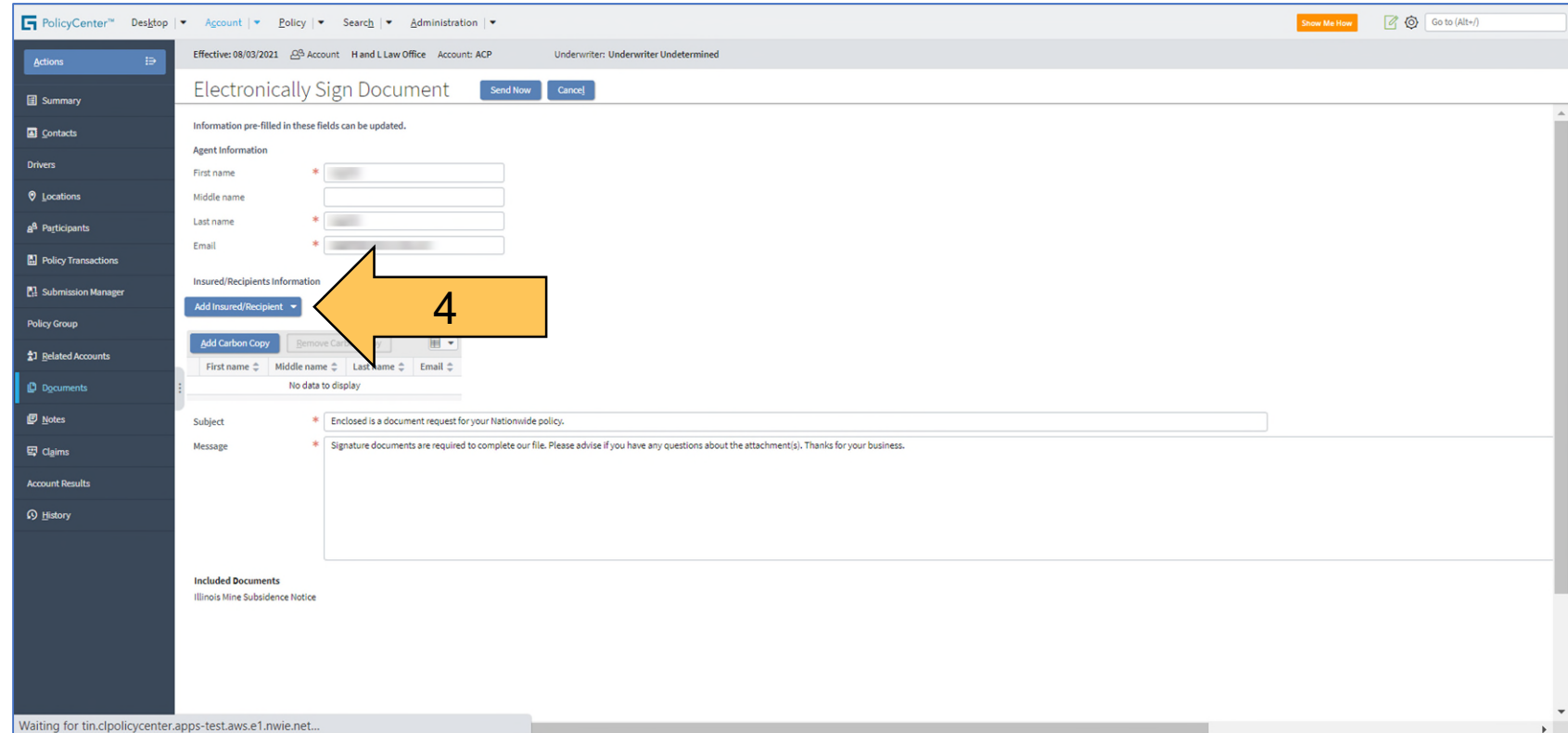
The DocuSign It button is activated once a document has been selected.

3. Click the DocuSign It button.



This brings you to the Electronically Sign Document screen.

4. Click the Add Insured/Recipient button (this will open a new field).



PolicyCenter™ Desktop | Account | Policy | Search | Administration | Show Me How | Go to (Alt+/)

Effective: 08/03/2021 Account: H and L Law Office Account: ACP Underwriter: Underwriter Undetermined

Electronically Sign Document

Information pre-filled in these fields can be updated.

Agent Information

First name *
Middle name
Last name *
Email *

Insured/Recipients Information

Add Insured/Recipient

Add Carbon Copy **Remove Carbon Copy**

First name Middle name Last name Email
No data to display

Subject * Enclosed is a document request for your Nationwide policy.

Message * Signature documents are required to complete our file. Please advise if you have any questions about the attachment(s). Thanks for your business.

Included Documents
Illinois Mine Subsidence Notice

Waiting for tin.clpolicycenter.apps-test.aws.e1.nwie.net...



5. Fill out the Insured/Recipients Information field plus any other required fields.

PolicyCenter™ Desktop Account Policy Search Administration

Effective: 08/03/2021 Account: H and L Law Office Account: ACP Underwritten: Underwriter Undetermined

Electronically Sign Document

Send Now Cancel

Information pre-filled in these fields can be updated.

Agent Information

First name *

Middle name

Last name *

Email *

Insured/Recipients Information

Add Insured/Recipient

First name * Joe

Middle name

Last name * Smith

Email * smithj@gmail.com

Add Carbon Copy Remove Carbon Copy

First name Middle name Last name Email

No data to display

Subject

* Enclosed is a document request for your Nationwide policy.

Message

* Signature documents are required to complete our file. Please advise if you have any questions about the attachment(s). T ess.

Included Documents

Illinois Mine Subsidence Notice

Waiting for tin.clpolicycenter.apps-test.aws.e1.nwie.net...

eSignature: Complete Required Fields/Send Now



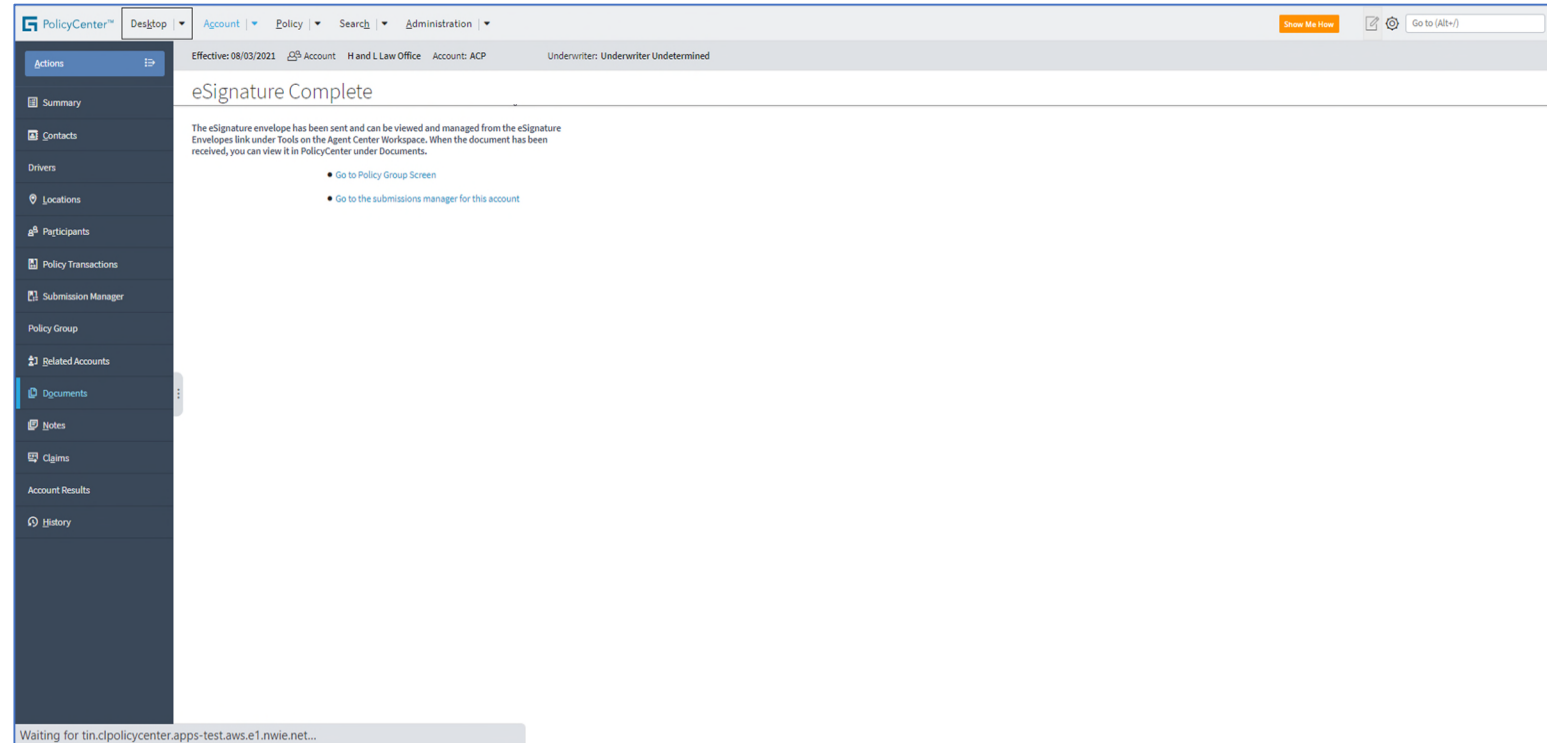
The documents included for DocuSign will be listed in the Included Documents section of the eSignature form.

6. Click Send Now.

A screenshot of the PolicyCenter web application's eSignature interface. The page title is "Electronically Sign Document". It contains several sections: "Agent Information" with fields for First name, Middle name, Last name, and Email; "Insured/Recipients Information" with fields for First name (filled with "Joe"), Middle name, Last name (filled with "Smith"), and Email (filled with "smithj@gmail.com"); and a "Subject" field filled with "Enclosed is a document request for your Nationwide policy." and a "Message" field filled with "Signature documents are required to complete our file. Please advise if you have any questions about the attachment(s). Thanks for your business." A yellow arrow labeled "6" points to the "Send Now" button in the top right corner. A green box highlights the "Included Documents" section at the bottom, which lists "Illinois Mine Subsidence Notice". The left sidebar shows a navigation menu with options like Summary, Contacts, Drivers, Locations, Participants, Policy Transactions, Submission Manager, Policy Group, Related Accounts, Documents, Notes, Claims, Account Results, and History. The top navigation bar includes "PolicyCenter", "Desktop", "Account", "Policy", "Search", and "Administration".



The eSignature Complete screen will appear.



eSignature: Verify eSignature Complete/Received



When the customer signs the document, you will receive an email notification.

You can check on the status of a contingency in PolicyCenter by accessing the policy and clicking Risk Analysis (found in the Left Navigation bar). If the customer has completed the eSignature process, the Contingency will show as Resolved.

The screenshot displays the PolicyCenter interface for Policy Group PG10008471. The left navigation bar includes sections like Actions, Summary, Contacts, Drivers, Locations, Participants, Policy Transactions, Submission Manager, Policy Group, Related Accounts, Documents, Notes, Claims, Account Results, and History. The main content area shows 'Policy Group Information' with details such as Policy Group Term (08/03/2021 - 08/03/2022), Policy Group Number (PG10008471), First Effective Date (08/03/2021), and Last Expiration Date (08/03/2022). Below this, the 'Contingencies' tab is active, showing a table with columns: Title, Status, Product, Completion Date, Completed By, Due Date, and On. A single row is visible with the title 'Mine Subsidence', status 'Resolved', product 'Businessowners', completion date '10/02/2021', completed by 'Policy Center', due date '08/23/2021', and on date '10/02/2021'. A large yellow arrow points to the 'Resolved' status in the table.

Title	Status	Product	Completion Date	Completed By	Due Date	On
Mine Subsidence	Resolved	Businessowners	10/02/2021	Policy Center	08/23/2021	10/02/2021

eSignature: Contingency Details/View Documents



By clicking the contingency, you can see details of the contingency as well as view any documents that are related to that contingency.

The screenshot displays the PolicyCenter web application interface. The top navigation bar includes links for Desktop, Account, Policy, Search, and Administration. The left sidebar contains a menu with options: Summary, Contacts, Drivers, Locations, Participants, Policy Transactions, Submission Manager, Policy Group (highlighted), Related Accounts, Documents, Notes, Claims, Account Results, and History.

The main content area is titled "Contingency" and shows details for a specific contingency. The details include:

- Document ID: BPAR0005
- Title: Mine Subsidence
- Occurrences: 1
- Description: IL Location 1, Building 1 - A completed and signed NI-0065 the company.
- Due Date: 08/23/2021
- Agency Reminder (days prior to due date): 10

The status is "Resolved". The "Created On" date is 10/02/2021. The "Closed By" is Policy Center. The "Closed On" date is 10/02/2021.

Below the details, there is a "Documents" section with a "Refresh" button. It displays a table of documents related to the contingency:

Name	Actions	Signature	Type	Date	Requested Date
Illinois Mine Subsidence Notice	View	Signed		12/15/2020 04:43:10 PM	10/02/2021
Illinois Mine Subsidence Notice	View	Unsigned		12/15/2020 02:15:39 PM	10/02/2021

Below the documents table, there is a "Notes" section with an "Add Note" button. It displays a table for notes:

Subject	Date	Author
No data to display		



What documents are available for DocuSign?

Specific trailing documents for PolicyCenter policies will be eligible for DocuSign. Examples include:

- *BOP and Property*: Mine Subsidence, Windstorm/Hail Exclusion
- *Business Auto*: PIP Form, UM/UIM Forms, Driver Exclusion Form
- *General Liability*: Lead Liability Certificate
- *Inland Marine*: Wind/Hail Exclusion for Builders Risk and Installation Floaters

NOTE: This list is NOT all-inclusive, varies by state, and is subject to change; check the “DocuSign It” tags in PolicyCenter (in the Documents screen) for eSignature eligibility.





Some of the more frequently-used trailing documents are also automatically sent to customers and will include barcodes, allowing the forms to be attached to customers' files electronically if they elect to sign and return the forms by mail.

eSignature, however, ensures that the documents are returned promptly and efficiently. **This is a big win!** Using eSignature for every eligible document will **save time for the customer and for you!**





eSignature is a quick, convenient way for customers to sign and return trailing documents.

If, however, a customer elects to send the form to you via email or fax, you can upload the document yourself into Document Vault.





Document Vault: Accessing Doc Vault in Agent Center

You will access Document Vault through Agent Center* (Personal or Commercial & Agribusiness/Tools/Doc Vault).

If you need a refresher on Document Vault, consult the Document Vault in Agent Center job aid in the Nationwide Learning Site:

<https://nationwidelearning.fugent.com/agentcenter>

*accessHarleysville® agents will also access Doc Vault through Agent Center; the Action drop-down on the accessHarleysville® portal launches to Agent Center.

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POLICY	START A QUOTE	RETRIEVE A QUOTE	TOOLS
My accounts	Commercial quote	Retrieve commercial & agribusiness quote	Appetite guide
View a policy	Agribusiness quote	Retrieve NBS brokerage quote	eSignature
Change a policy	Management lines package non-profit quote	Retrieve a surety & fidelity bond quote	Documents uploads (DocuVault)
Print policy docs	Management lines package private quote		Commercial buildings & structures estimator
Certificate of insurance	Agent E&O program quote		Farm residence estimator
Cancel a policy	NBS brokerage quote		Underwriting & product manuals
	Surety & fidelity bond quote		PolicyCenter

Policies Summary

☒ Reuse Action Window

Product	Program	Policy #	Eff Date	Exp Date	Status	Action
 WC7WorkersComp	ACP	WC013801018481	11/25/19	04/01/20	Bound	<div><div>Select Action -</div><div>Service Policy</div><div>COI</div><div>DocVault</div></div>
 CA7CommAuto	ACP	BA013801018481	10/01/19	04/01/20	Bound	