

# Create and View Notes in PolicyCenter



## Description:

This job aid reviews how to create and view a policy's notes in PolicyCenter.

Two procedures are discussed in this job aid:

- [View Notes in PolicyCenter](#)
- [Create a New Note in PolicyCenter](#)

## View Notes in PolicyCenter

### Step 1

#### Action

If you need to view an existing note on a submission or policy:

- Click the **Notes** link in the **Tools** section.

#### Screen

The screenshot displays the PolicyCenter interface. The top navigation bar includes 'PolicyCenter', 'Desktop', 'Account', 'Policy', 'Search', 'Team', 'Administration', 'Testing', and 'Training'. The main content area is titled 'Policy Info' and shows details for a policy. The left sidebar contains a 'Tools' section with a list of options: Policy Info, Drivers, Accidents/Violations, Vehicles, Usage Based Insurance, Coverages, Lienholder/Additional..., Quote, Forms, Notes (highlighted with a green box), Available Coverages, and Documents. The 'Policy Info' section includes fields for Primary Named Insured (Veronica S Salt), Policy Address (100 S MUESSING ST, INDIANAPOLIS, IN 46229-2927), County (MARION), Business Type (New Business), Secondary Named Insured, Household Composition (Are there additional auto policies in the household insured under the Nationwide Family of Companies? Yes), Number of other drivers (2), Number of other vehicles (2), Date of Birth of youngest driver (03/16/2001), and Company Car (No). The right sidebar contains sections for Policy Details, Discounts, Financial Products, and Nationwide Document.

## Job Aid Process (View Notes Cont.) :

### Step 2

Action	Screen
<p>The <i>Notes</i> screen displays.</p> <p><b>Note:</b> Any notes on the submission or policy display at the bottom of the screen. In this example, one note is tied to the policy.</p> <p><b>Note:</b> A user can only <b>Edit</b> or <b>Delete</b> Notes they have added to a policy. Notes entered by other users can be viewed, but not deleted or edited.</p>	

## Create a New Note in PolicyCenter

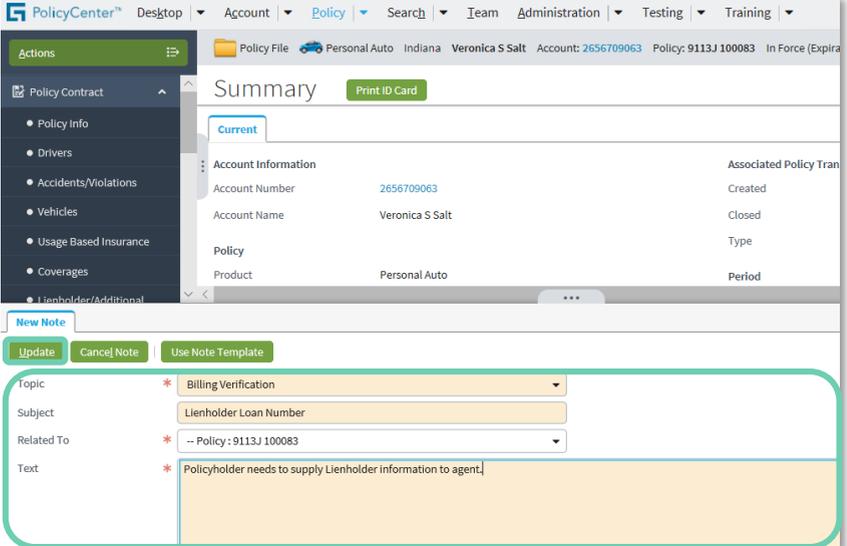
### Step 1

Action	Screen
<p>To create a new note on a submission or policy:</p> <ul style="list-style-type: none"> <li>Click the <b>Actions</b> button.</li> <li>Select <b>New Note</b> from the drop-down menu.</li> </ul> <p>A new Note can be added at any time during the quoting process or after a policy has been bound.</p>	



## Job Aid Process (Create a New Note Cont.) :

### Step 2

Action	Screen
<p>The <i>New Note</i> section appears at the bottom of the screen.</p> <ul style="list-style-type: none"> <li>Once you have completed the required fields, click the <b>Update</b> button to add the new note to the submission or policy.</li> <li>The new note displays in the <i>Notes</i> section at the bottom of the screen.</li> </ul>	

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