

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 shows the PolicyCenter Desktop interface. The top navigation bar includes links for Account, Policy, Search, Team, Administration, Testing, and Training. The left sidebar has a 'Tools' section with a green box around the 'Notes' link. The main content area displays 'Policy Info' for a policy owned by Veronica S Salt. The policy details include:

Primary Named Insured	
Name	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
Company Car	No

On the right side of the screen, there are sections for 'Policy Details', 'Discounts', 'Financial Products', and 'Nationwide Document'.

Job Aid Process (View Notes Cont.) :

Step 2

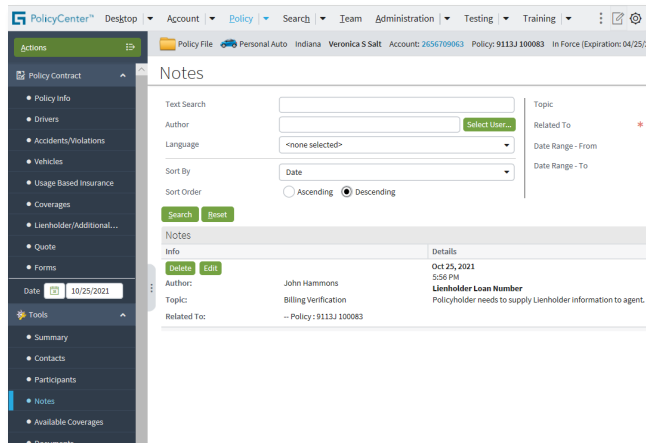
Action

The *Notes* screen displays.

Note: Any notes on the submission or policy display at the bottom of the screen. In this example, one note is tied to the policy.

Note: A user can only **Edit** or **Delete** Notes they have added to a policy. Notes entered by other users can be viewed, but not deleted or edited.

Screen



Create a New Note in PolicyCenter

Step 1

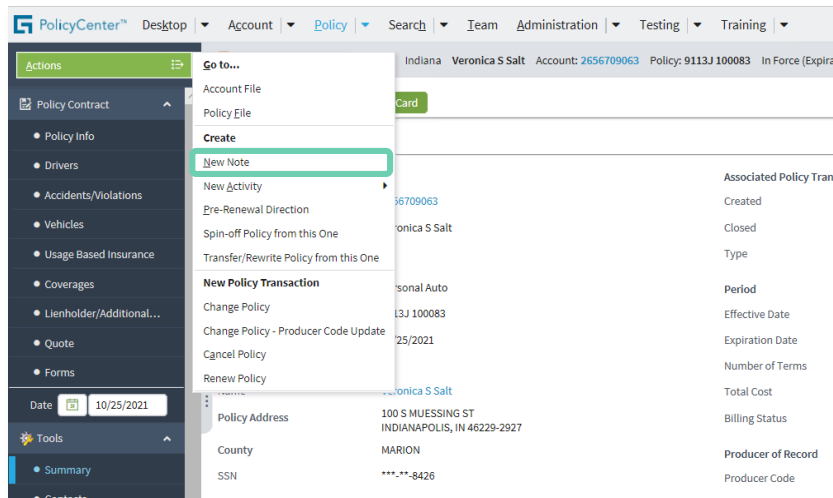
Action

To create a new note on a submission or policy:

- Click the **Actions** button.
- Select **New Note** from the drop-down menu.

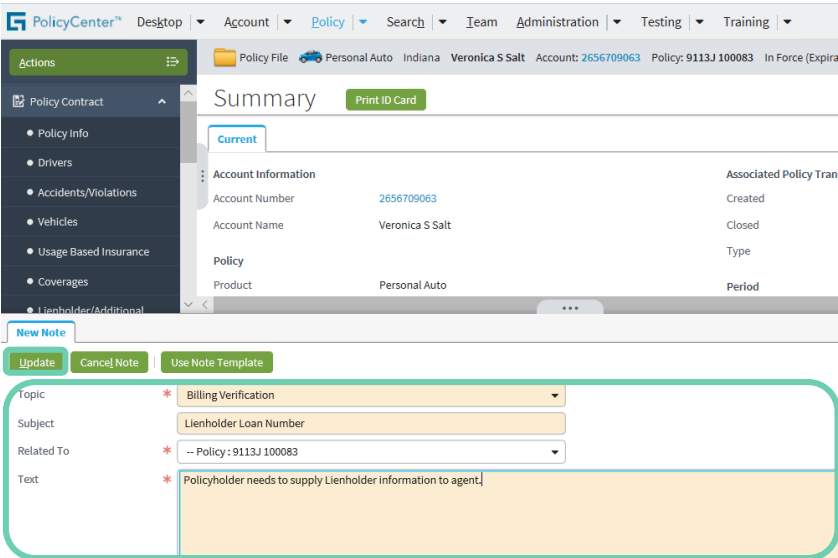
A new Note can be added at any time during the quoting process or after a policy has been bound.

Screen



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"> Once you have completed the required fields, click the Update button to add the new note to the submission or policy. The new note displays in the <i>Notes</i> section at the bottom of the screen. 	

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