

# 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.*

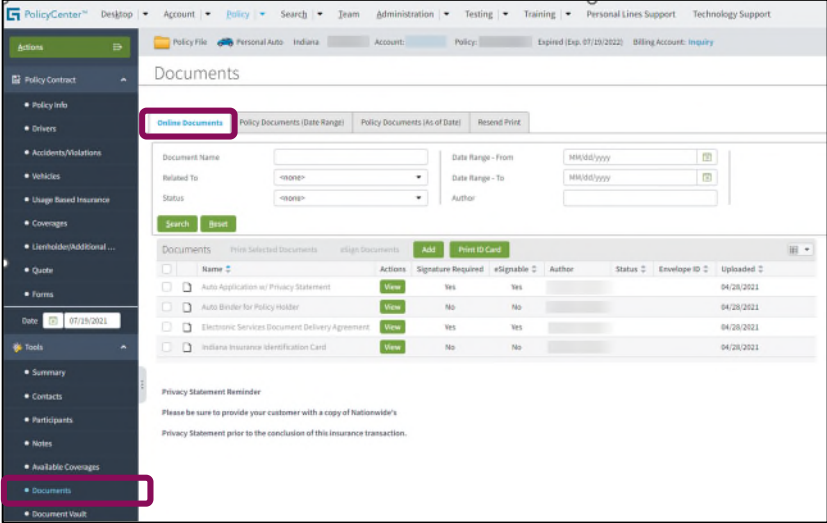
- *The system will default to "Yes" and the customer's email address will be populated if available*
- *If the email address is not available, the system will require you to enter one to continue*
- *Select "No" on the "Policy Info" screen to manually send out required documents in the customer's preferred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

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

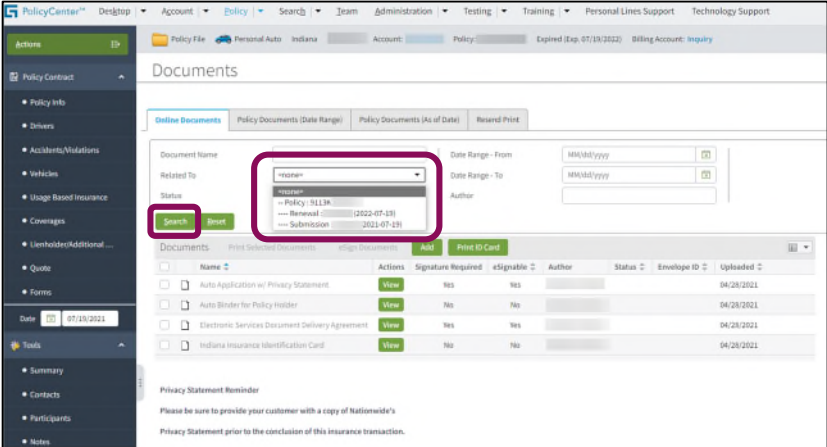
- [Online Documents](#)
- [Policy Documents \(Date Range\)](#)
- [Policy Documents \(As of Date\)](#)
- [Resend Print](#)

### Online Documents

#### Step 1

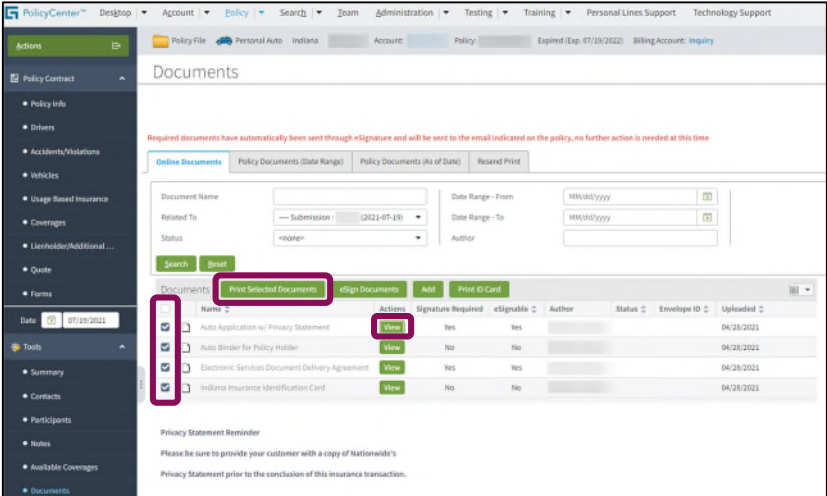
Action	Screen
<p>Once you have a policy open, navigate to the “Documents” screen.</p> <p>From the “Documents” screen:</p> <ul style="list-style-type: none"><li>Select the “Online Documents” tab.</li></ul>	

#### Step 2

Action	Screen
<p>From the “Online Documents” tab:</p> <ul style="list-style-type: none"><li>Choose the appropriate option from the “Related To” drop-down.</li><li>Select “Search”.</li></ul> <p>A list of documents meeting your search criteria will appear in the “Documents” section.</p>	

### Online Documents, continued

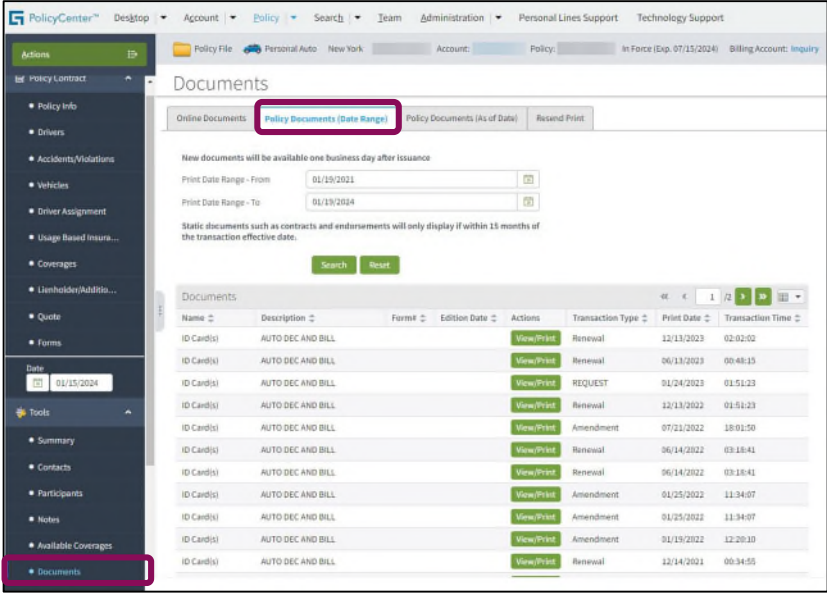
### Step 3

Action	Screen
<p><b>To print a document:</b></p> <ul style="list-style-type: none"><li>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.</li><li>Select “Print Selected Documents”.</li></ul> <div><div>!</div><div><p>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.</p></div></div>	
<p><b>To review a document:</b></p> <ul style="list-style-type: none"><li>Select the green “View” button next to the name of the document you wish to review.</li></ul>	

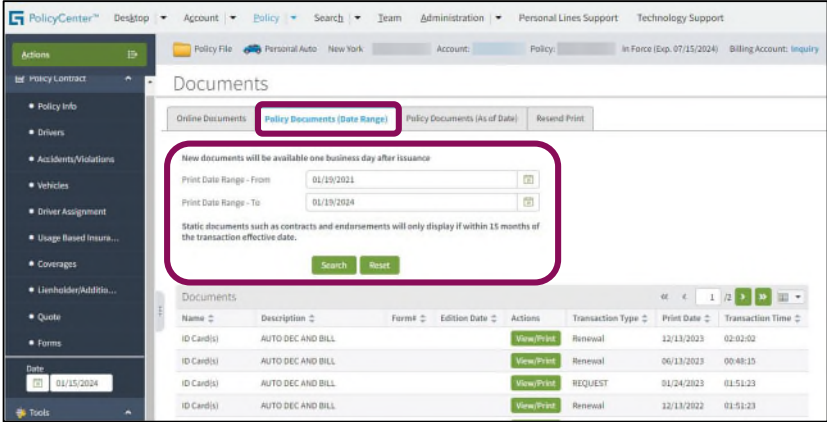
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### Policy Documents (Date Range)

#### Step 1

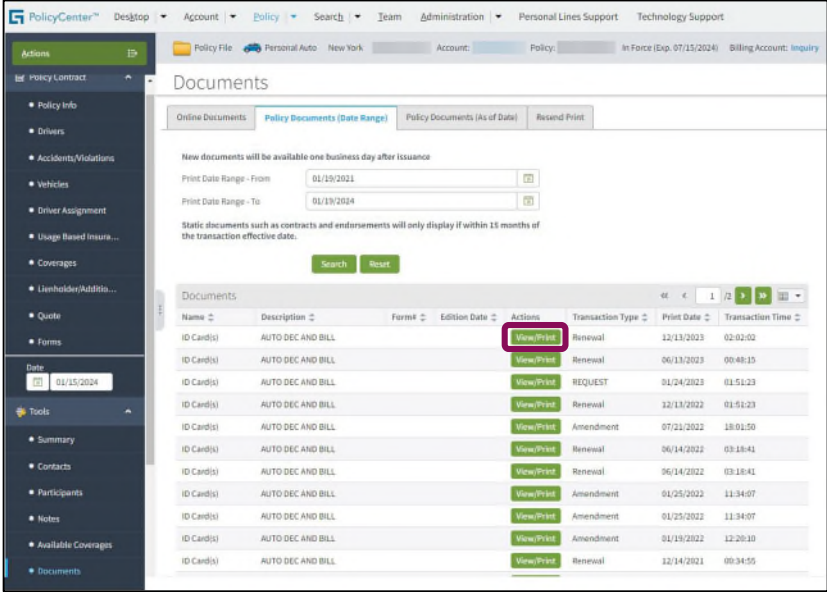
Action	Screen
Once you have a policy open, navigate to the “Documents” screen.  From the “Documents” screen: <ul style="list-style-type: none"><li>Select the “Policy Documents (Date Range)” tab.</li></ul>	

#### Step 2

Action	Screen
On the “Documents” screen: <ul style="list-style-type: none"><li>Select “Policy Documents (Date Range)”.</li><li>Enter the desired date range search criteria.</li></ul>	

Policy Documents (Date Range), continued

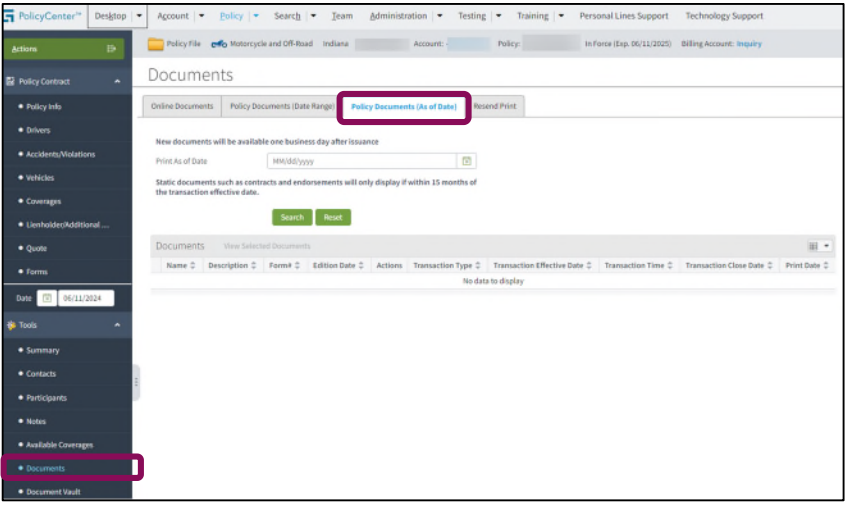
Step 3

Action	Screen
<div><p>From the “Documents” section:</p><ul style="list-style-type: none"><li>Select the “View/Print” button for the document you want to review and/or print.</li></ul></div> <div><div>!</div><div><p>A PDF of the document will pop up on your screen. Either save it to your desktop and send it electronically to your customer, or if your customer is present, print and hand it to them.</p></div></div>	

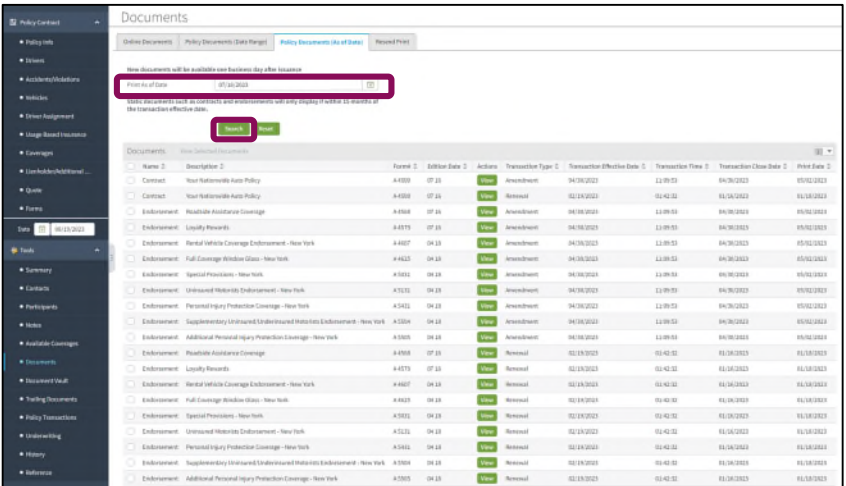
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### Policy Documents (As of Date)

#### Step 1

Action	Screen
<p>Once you have a policy open, navigate to the “Documents” screen.</p> <p>From the “Documents” screen:</p> <ul style="list-style-type: none"><li>Select the “Policy Documents (As of Date)” tab.</li></ul>	

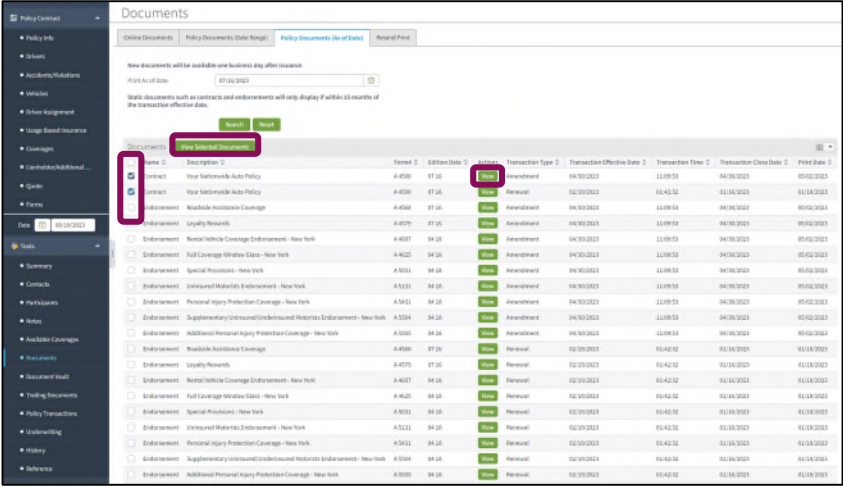
#### Step 2

Action	Screen
<p>From the “Policy Documents (As of Date)” tab:</p> <ul style="list-style-type: none"><li>Select the “Print As of Date”.</li><li>Select “Search”.</li></ul> <p>A list of documents meeting your search criteria will appear in the “Documents” section.</p>	



### Policy Documents (As of Date), continued

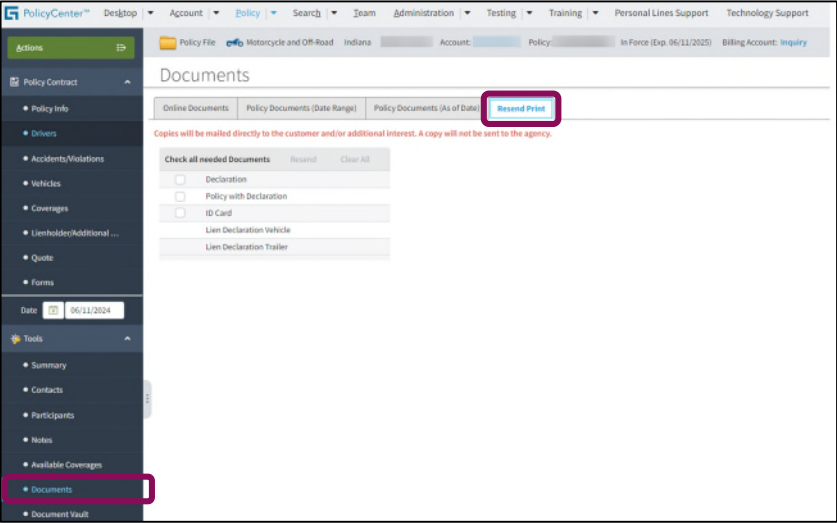
#### Step 3

Action	Screen
<p><b>To print a document:</b></p> <ul style="list-style-type: none"><li>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.</li><li>Select “View Selected Documents”.</li></ul> <div><div>!</div><p>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.</p></div>	
<p><b>To review a document:</b></p> <ul style="list-style-type: none"><li>Follow the same steps above for “To print a document” without printing the document.</li><li>Select the green “View” button next to the name of the document you wish to review.</li></ul>	

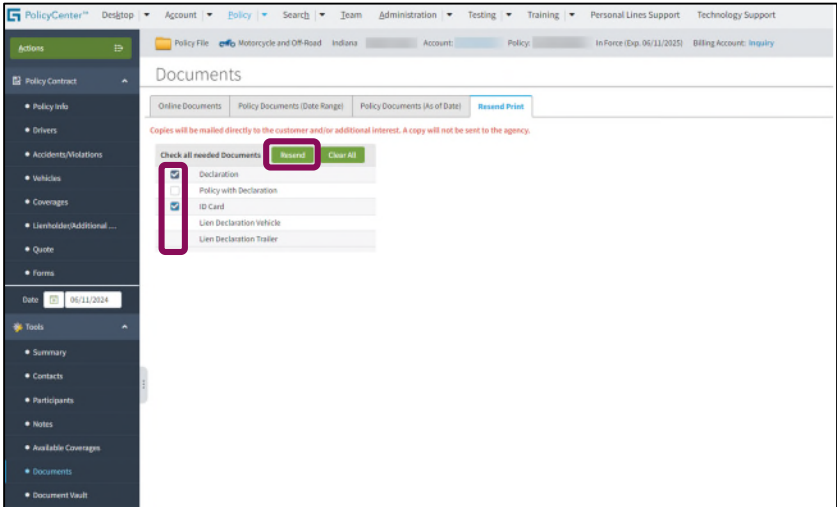
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### Resend Print

#### Step 1

Action	Screen
<p>Once you have a policy open, navigate to the “Documents” screen.</p> <p>From the “Documents” screen:</p> <ul style="list-style-type: none"><li>Select the “Resend Print” tab.</li></ul>	


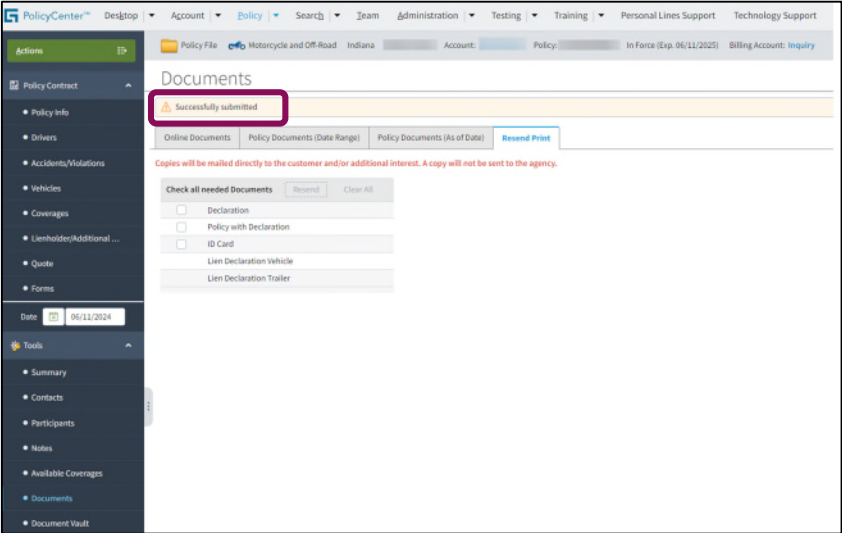
#### Step 2

Action	Screen
<p>From the “Resend Print” tab:</p> <ul style="list-style-type: none"><li>Select all the documents being requested.</li><li>Select “Resend”.</li></ul>	



### Resend Print, continued

#### Step 3

Action	Screen
<p>You will see an alert (“Successfully submitted”) at the top of the screen.</p> <div><p>Documents will be mailed out the following business day.</p></div>	

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