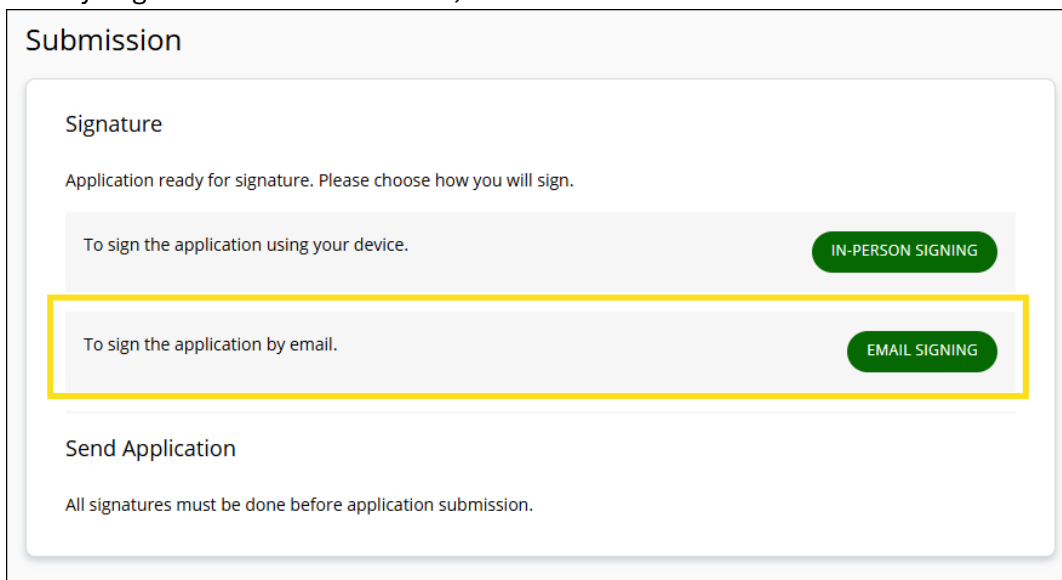# DocuSign with eApp

Agents and members now have the option to electronically sign an application using DocuSign.

Important Notes:

- The time out period from when the signer(s) receive the original email is 3 days. After 3 days, the link will no longer be valid. An email will be sent to the signer stating the signature process has been voided. For additional details, click here.
- All signers need to agree to electronically sign with DocuSign or all signers should complete their electronic signatures using In-Person Signing.

How to use DocuSign

1. Start **Entering** the application as you do today

2. Once you get to the Submission Tab, **Click** the EMAIL SIGNING button

3. **Enter** an Access Code and a valid Email Address for each signer. The email address fields will automatically populate when the email addresses are entered during the application process.
   a. The Access Code should be easy for the signer to remember as they will need it to access the DocuSign documents
   b. Access codes must be: 6-50 characters, cannot include spaces nor the following characters: <, >, #, &. Access codes are not case sensitive
   c. Click here for additional information

4. **Click** Send eMail
   a. Once sent, the Submission screen will display a message "Waiting on signatures"
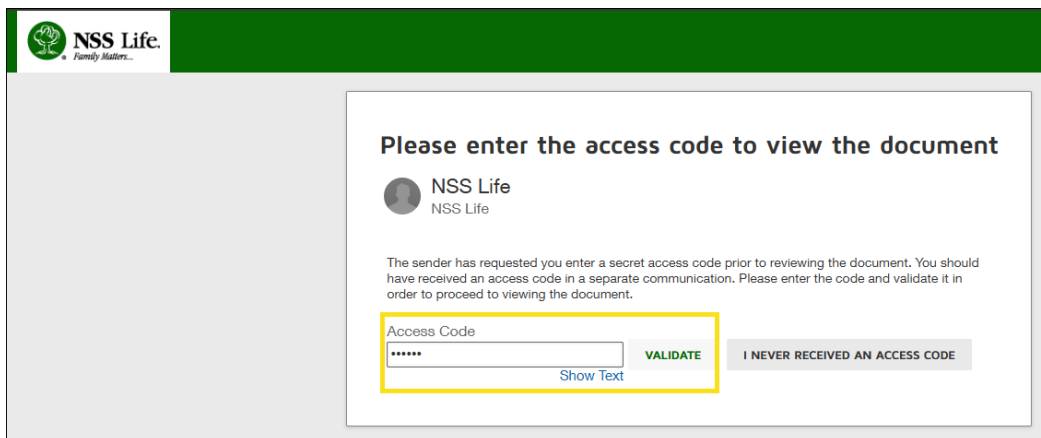
5. Ask the Client to check their email

Signing of the Document(s) via DocuSign

1. **Open** the email received from NSS Life via DocuSign

2. **Click** Review Document
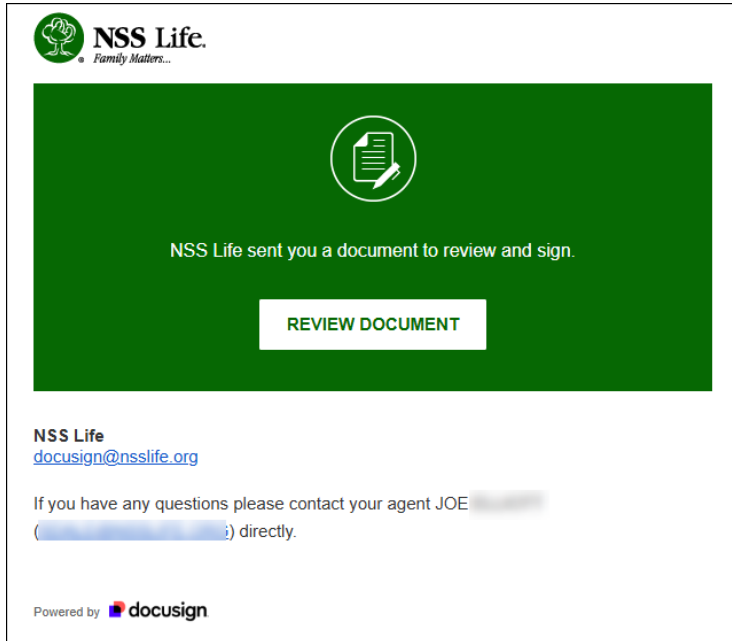
3. On the next screen, **Enter** the previously created Access Code
   a. Click here for additional information if the Access Code was never received or forgotten

4. **Click** Validate

The next series of screens are where the Signatures are captured

5. **Read** the Electronic Record and Signature Disclosure by clicking on the link

6. **Checkmark** box – "I agree to use electronic records and signatures"

7. **Click** Continue

8. **Click** START, this will now start the signing process
   a. Ensure that each signer reviews the document(s) for correctness prior to applying their electronic signature
   b. DocuSign will display a unique ID number, throughout the signature process

9. After clicking Start, DocuSign will take the signer to the 1st signature line, **Click** the yellow Sign flag
   a. **Select** your method of signing:
      i. Select Style – Allows the signer to choose the style by clicking Change Style. Most commonly used
      ii. Draw – Allows the signer to use their own signature if they have touch screen capabilities on their device
      iii. Upload – Allows the signer to upload a signature image file if they have one
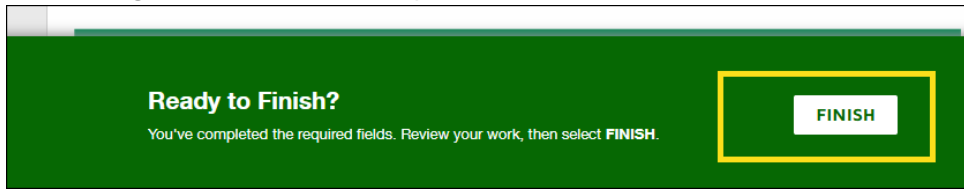

10. **Continue** to sign the document as prompted by clicking the yellow Sign flags

11. After all signatures have been captured, **click** FINISH

Ready to Finish?
You've completed the required fields. Review your work, then select **FINISH**.

FINISH

12. The next signer "in line" will receive an email and follow Steps 1-11 listed above
    a. This will be the process until all signatures have been captured
    b. Once signatures have been captured, signers will receive a confirmation email that the document has been completed and will have the ability to download a copy of the signed document

Submitting the Application

1. After all signatures have been captured, the Agent will **return** to the Application in eApp

Application forms

Application ID	Insured	Form	Status
1000		Life Application	SIGNATURE IN PROGRESS
1000		Life Application	SUBMISSION SUCCESS
1000		Life Application	SIGNATURE SUCCESS
1000		Life Application	SIGNATURE IN PROGRESS
1000		Life Application	READY

2. **Click** the Submission tab

3. **Click** the SUBMIT button to submit the application to the Home Office for further processing
    a. Once Submitted, the Submission screen will display Submission Success and provide the Policy Number
    b. Agents also have the ability to download the completed, signed documents from this screen

Submission

Signature

✓ All signatures are completed.

DOWNLOAD SIGNED DOCUMENT

Send Application

SUBMIT

Submission

Signature

✓ All signatures are completed.

DOWNLOAD SIGNED DOCUMENT

Send Application

✓ Submission Success

Assigned policy number : 1616

Next Steps

Thank you for your submission. An Underwriter will review your case and contact you with any questions or additional information, if needed.

If you have any other questions or concerns, please contact NSS Life by phone at (800) 488-1890 or by e-mail at sales@nsslife.org.

FAQs

Q1. It's been longer than 3 days and the link is no longer valid. What do I do?

When the signers are ready to sign, return to the Submission page and click Resend email button.

Q2. What if I don't receive an Access Code or I forgot my Access Code?

The Access Code is created by the signer. If they forgot their code, the Agent can provide it as it displays on the Submission screen in eApp.

If the signer clicked the 'I Never Received an Access Code' button, the agent will need to return to the Submission screen, enter a different Access Code if requested, and click on Resend Email.

Q3. Can all users have the same Access Code?

Yes, while they can choose their own unique codes, they can all share the same code.

Q4. Where is my access code?

You create it at the time of signing. All access codes can be viewed on the submission screen in the eApp.