

DocuSign with eApp

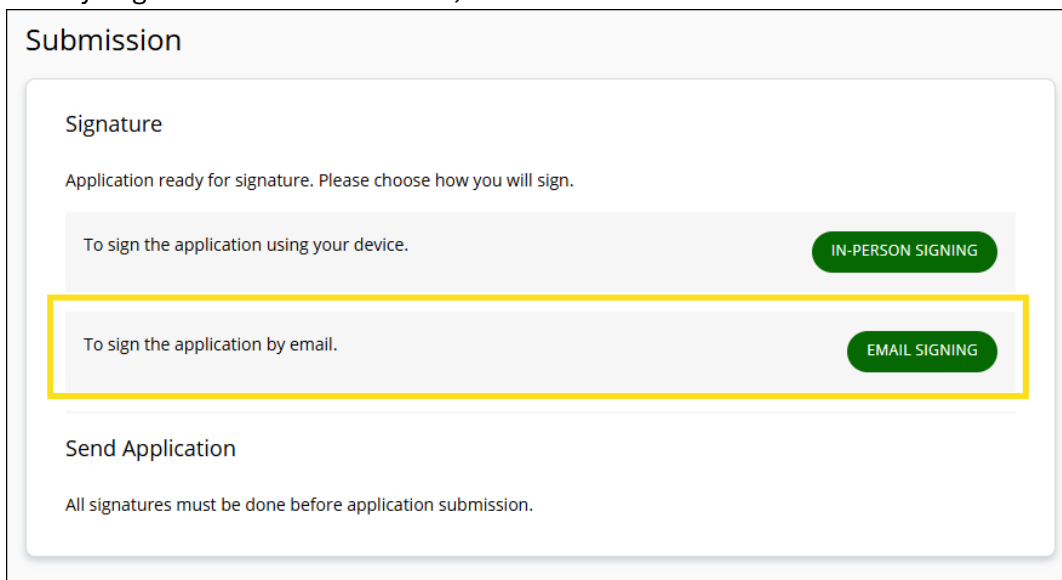
Agents and members now have the option to electronically sign an application using DocuSign.

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



The screenshot shows a 'Submission' screen with a 'Signature' section. Below the heading, it says 'Application ready for signature. Please choose how you will sign.' There are two options: 'To sign the application using your device.' with an 'IN-PERSON SIGNING' button, and 'To sign the application by email.' with an 'EMAIL SIGNING' button. The 'EMAIL SIGNING' option is highlighted with a yellow border. Below this is a 'Send Application' section with the text 'All signatures must be done before application submission.'

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

Submission

Signature

Each client will be required to enter their Access code to review and sign the necessary document(s). Confirm this access code with the client prior to sending the email for signing. The default value (other than blank) may be used for an Access code or a new value may be entered. The Access code entered here should be something easy for the client to remember, such as mother's maiden name, name of first pet, place of birth, etc.

Access codes must be:

- 6-50 characters in length
- Cannot include <, >, &, # or spaces

[Redacted] (Insured)

Access Code * Email Address *

[Redacted] (Agent)

Access Code * Email Address *

SEND EMAIL **CANCEL**

Send Application

All signatures must be done before application submission.

4. **Click Send eMail**

- a. Once sent, the Submission screen will display a message “Waiting on signatures”

Submission

Signature

Each client will be required to enter their Access code to review and sign the necessary document(s). Confirm this access code with the client prior to sending the email for signing. The default value (other than blank) may be used for an Access code or a new value may be entered. The Access code entered here should be something easy for the client to remember, such as mother's maiden name, name of first pet, place of birth, etc.

Access codes must be:

- 6-50 characters in length
- Cannot include <, >, &, # or spaces

Created **[Redacted] (Insured)**

Access Code * Email Address *

Created **[Redacted] (Agent)**

Access Code * Email Address *

Waiting on signatures.

RE-SEND EMAIL **CANCEL**

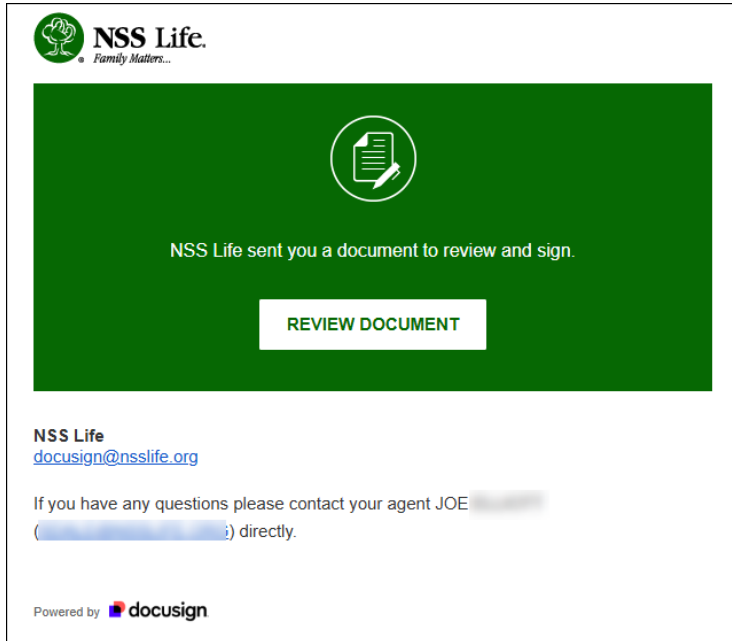
Send Application

All signatures must be done before application submission.

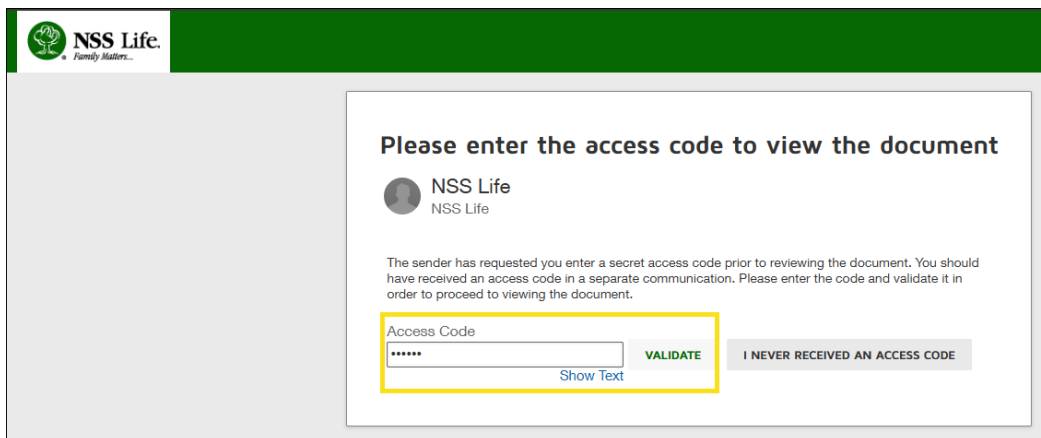
5. Ask the Client to check their email

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**

Please Review & Act on These Documents

NSS Life
NSS Life

NSS Life
Family Matters...
Powered by docuSign

Please read the [Electronic Record and Signatures Disclosure](#)
 I agree to use electronic records and signatures

CONTINUE OTHER ACTIONS ▾

Is the applicant a member of the National Slovak Society? Yes No If not, applying for membership.

2. Owner: (Complete only if Owner is other than Proposed Insured)
Full Name: _____ Phone Number: _____

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

Please review the documents below. FINISH OTHER ACTIONS ▾

START DocuSign Envelope ID: 63703102-4E09-40D3-8C4E-58C0F66A6A1D

NSS Life
Family Matters...
NATIONAL SLOVAK SOCIETY OF THE UNITED STATES OF AMERICA
A Fraternal Benefit Society
Application for Individual Annuity

Assembly/Circle #: _____ Certificate #: _____

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

SIGN

Required - Sign Here

Signature Sign

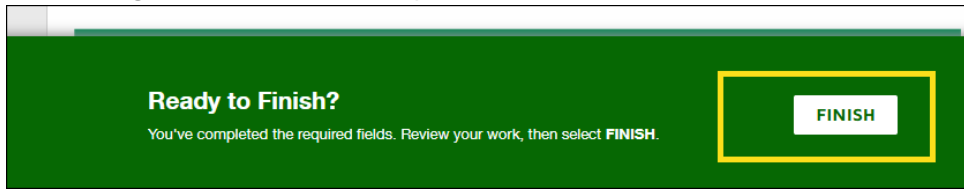
Date 05-21-2024

National Slovak Society of the USA 351 Valley Brook Rd, McMurray, PA 15317-3337 Telephone (724)731-0094 Fax (724)731-0145 www.nsslife.org

FORM # IOS - 002 P 05/01/2022

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

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

The image shows a screenshot of a table titled "Application forms". The table has four columns: "Application ID", "Insured", "Form", and "Status". There are five rows of data. The first row has a status of "SIGNATURE IN PROGRESS" which is highlighted with a yellow box. The second row has a status of "SUBMISSION SUCCESS". The third row has a status of "SIGNATURE SUCCESS". The fourth row has a status of "SIGNATURE IN PROGRESS". The fifth row has a status of "READY".

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.