Form Selection Tool (FST) – Multi-form packages – FAQ

How many forms can be bundle in a package:

The Form Selection Tool (FST) lets you bundle up to 5 forms from the same line of business into one eSign package for faster Client signing.

Some insurance forms don’t allow bundling capability; the tool will grey these forms if bundling is not available.

How do I access it?

Suncentral > Client Service > e-Signature form selection tool > Select language > Select advisor > Click Next

Are there MAC-specific instructions?

Yes — select only the Advisor ID, never the MAC ID. If you get an error, logout, close your browser, and start over. You cannot switch advisors within the same session.

Forms & Basics

Can I add the same form twice?

Sometimes. If the **Add Form** button turns grey, you can only add it once.

Do I need a policy number to start?

You'll need it when filling out form details, but you can start with Client info first. For Payout annuity, Superflex, or Sun GIC Max applications, you can leave the **Account/Contract/Policy number** field blank.

What if I’m interrupted while I’m filling out the form and need to come back later?

Click **Save as Draft** while completing a form. When you are ready to continue, find the appropriate package in Signature Centre under "Drafted" packages.

When you click on the package, you'll be taken back to the Form(s) and signer details page where you can continue filling out the form.

Note: If your package only had one form, when you click on the package, the form would open directly.

Signing Methods

What's the difference between in-person and remote signing?

In-person: Signer signs directly with you using your mouse, stylus, or touchscreen.

Remote: Signer receives an email and signs on their own time.

Can I request documents from the Client?

Only with remote signing via the **Request attachment** option. They'll be prompted to upload documents after they sign. Once the signing is complete, you'll have to review the attachments and **Complete package**.

Supplementary Documents & Attachments

Can I add extra documents (like void cheques or consent forms)?

Yes. On the **Verify signer details** page, under the appropriate signer, click **Supplementary Documents** and upload a PDF or JPG file. The Client will see these before signing.

Note: If the attachment/supplementary document button(s) are not displayed, that functionality has been disabled due to business rules.

Signature Centre

What do I do if I requested attachments from the signer?

After they sign, go to Signature Centre > Open the appropriate package > **Review attachments** > **View** the document > **Continue** > **Complete package**

How do I find a draft package?

In the Signature Centre search field, search by Client name or account number.

Troubleshooting

The message says "The selected form can only be sent by itself"

This form cannot be bundled. Create a separate package with just this form or remove it and send the others.

I can't search for a Client

Client search only works for individuals. For non-individual accounts, type the name manually.

I got a MAC ID error

Logout completely, close your browser, and start fresh. Select the **Advisor ID only**.

Need help?

Contact the Advisor Experience Team for questions or issues with the Form Selection Tool.