Form select tool – Multi-form packages – User guide

Contents

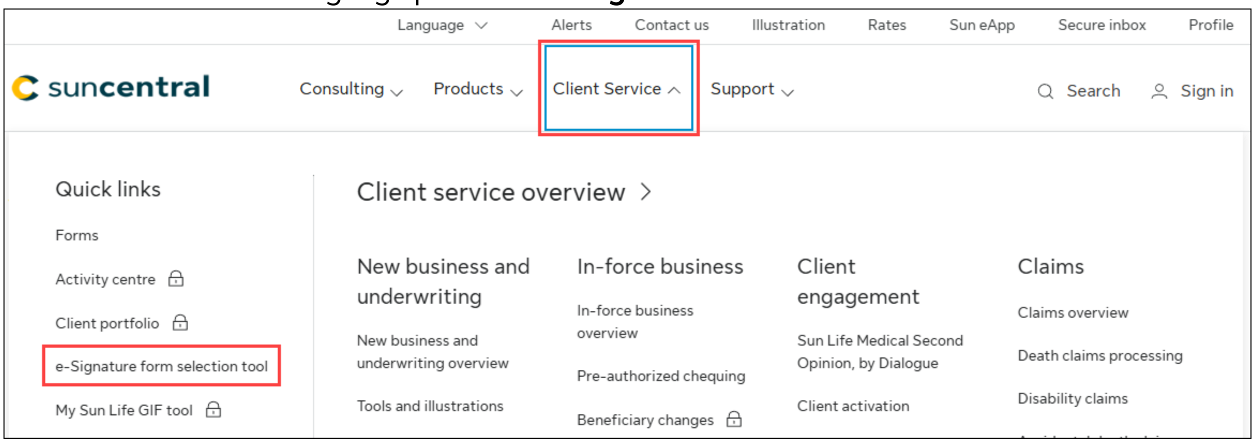
Last update: August 13, 2026

Introduction

This guide provides instructions on how to use Form selection tool (FST) to send up to five forms within the same line of business through a single eSign package.

Access the FST

1. From Suncentral, under **Client Service** mega menu, select **e-Signature form selection tool**. From the landing page that appears, select the appropriate button based on the Client's language preference: **English** or **French**.



2. From the drop-down list, select an **advisor**.

> **Tip**!
>
> **For MAC members only**:
>
> - Do not select the MAC ID. Only select the Advisor ID the work is being completed on behalf of. If you select the MAC ID, a "We are sorry…" error message will display. Logout and close the browser and repeat step one (above).
> - The tool will not function when attempting to switch to another advisor within the same session. If attempting to complete a form for a different advisor in the MAC, logout and close the browser and repeat step one (above).

3. Click **Next**.

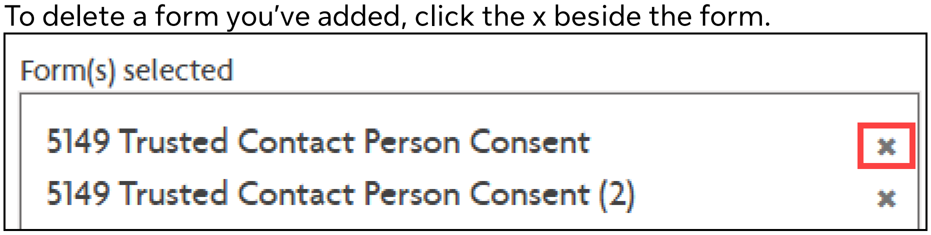
Use the FST

Select the forms and owner(s)

1. From the **Select a category** drop-down list, select the appropriate category.
2. From the **Select a form** (**maximum of 5 forms**) drop-down list, select the appropriate forms then click **Add Form**. Repeat this step as required. You may add a form multiple times, and you may add up to 5 forms.

> **Tips!**
>
> - Due to technical limitations, some forms can only be added once as part of a multi-form package. The **Add Form** button will be greyed when you try to select the form a second time. Other forms have to be sent in a stand-alone package. In those cases, after you add the first form, the other forms will be greyed out and the message **The selected form can only be sent by itself. No additional form can be added to this package** will appear.
> - The forms are listed in numerical order. When a form doesn't have a number, it's listed at the end.
> - If you add a form that will require you to send the Evidence Summary to a fund company, all signers in the package need to be the same. Otherwise, the FST will stop you. For example, if you have a transfer form with joint owners that need to sign, your other forms should only include the same two signers. Otherwise, personally identifiable information would be sent to the fund company when you send them your Evidence Summary.

- To delete a form you've added, click the x beside the form.



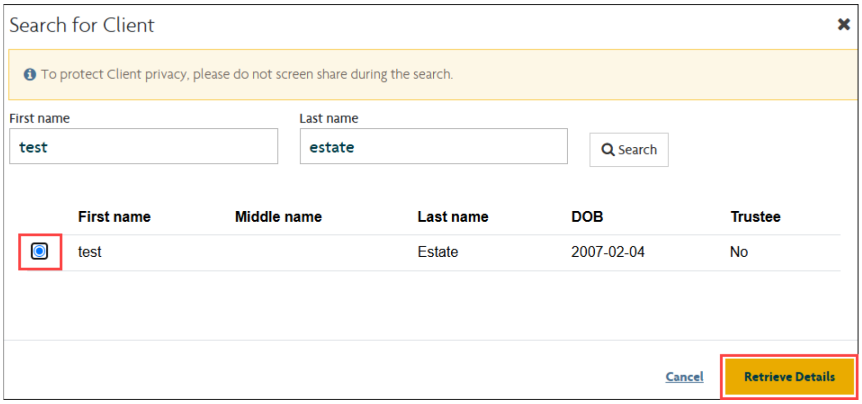
3. Select account type **Individual** or **Non-individual**.

> **Tip!** Client search is not currently available for non-individual accounts.

4. For:
   - An individual account owner:
     a. Find them by entering an appropriate **Account owner name(s)** using the **First name** and **Last name** field and click **Search**.

     > **Tip!** You can also click **Search** without entering a first name and last name and enter them on the next page.

b. From the **Search for Client** dialog box, select the appropriate person and click **Retrieve Details**.



c. If you can't find their information, **Cancel** and type their information manually.

- A non-individual account owner, type in their name.

5. Click **Next**.

Tip! The **Cancel** button deletes the record and closes this session.

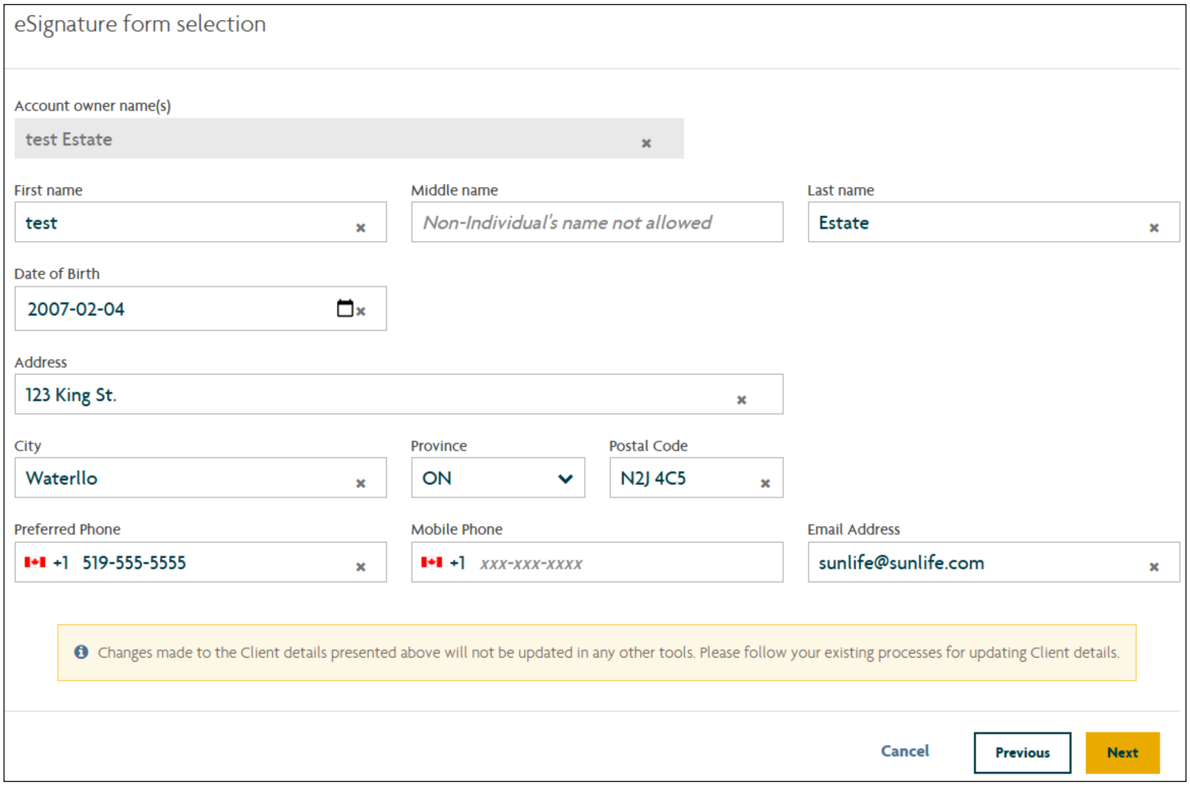
Review/enter owner details

1. Review the owner details and update any fields as needed.

Tips!

- Any changes to owner details will only apply to this session. Follow existing processes to make any permanent updates.
- If you entered a **non-individual owner**, you don't need to enter anything on this page.

2. Click **Next**.



Form(s) and signer details

This page lists the forms that you've selected previously. Each form has its own twistie that should be open and filled out.

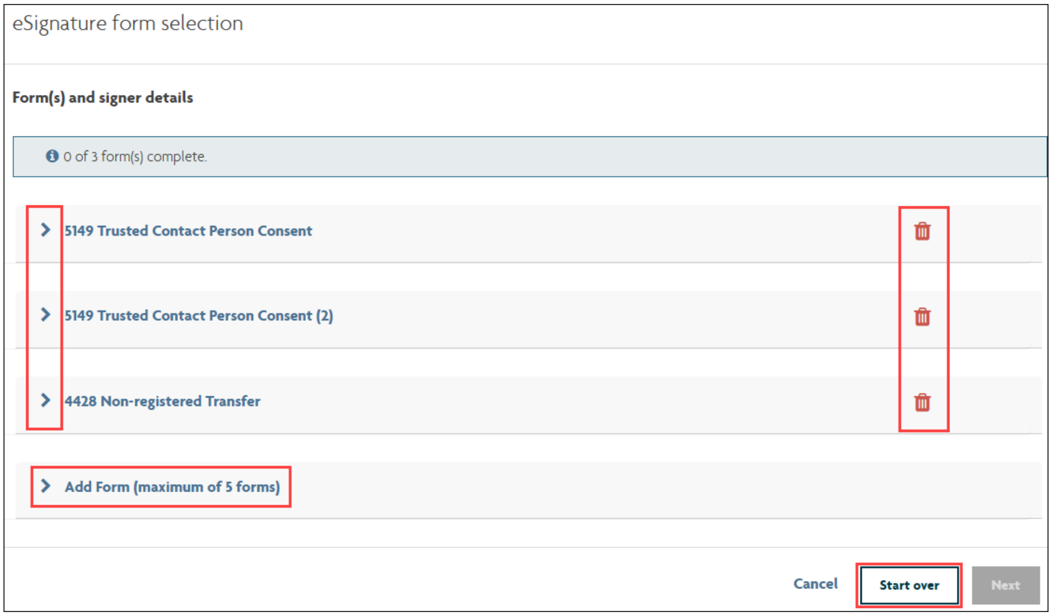
From this page, you can:

- **Delete** a form you've previously entered using the **trash can.**
- **Add** forms by selecting **Add Form** (**maximum of 5 forms**) and selecting the same instructions as on the previous page.
- **Start over** by clicking the **Start over** button.

Tip! The **Start over button** saves the current package as a draft and takes you make to the first page where you can start a new package. If you are an advisor staff and prepare eSign packages for them, this is a great feature!

To continue completing the saved package, go to **Signature centre** and open the appropriate package or delete it.

Under each twistie, you'll enter an **account/contract/policy number** and **select a signer** for each of the forms selected.

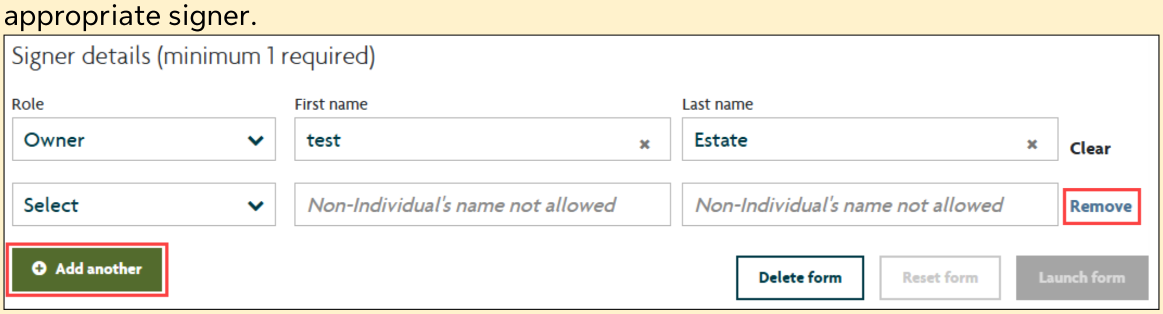


1. Open the first twistie.
2. In the **Account/Contract/Policy number** field, enter the policy number following the format xxxxxxx-x. For example, 1234567-8.

> **Tip!** If you do not have a policy number for Payout annuity, Superflex or Sun GIC Max applications leave the field blank.

3. In the **Role** drop-down list, select the option for the individual(s) signing the form.
4. In the **First name** and **Last name** fields, enter the name of the signer.

> **Tips!**
>
> - If you need to add signers, select **Add another**.
> - If you have more than one signer and want to delete one, click **Remove** beside the appropriate signer.



5. Click **Launch form**.

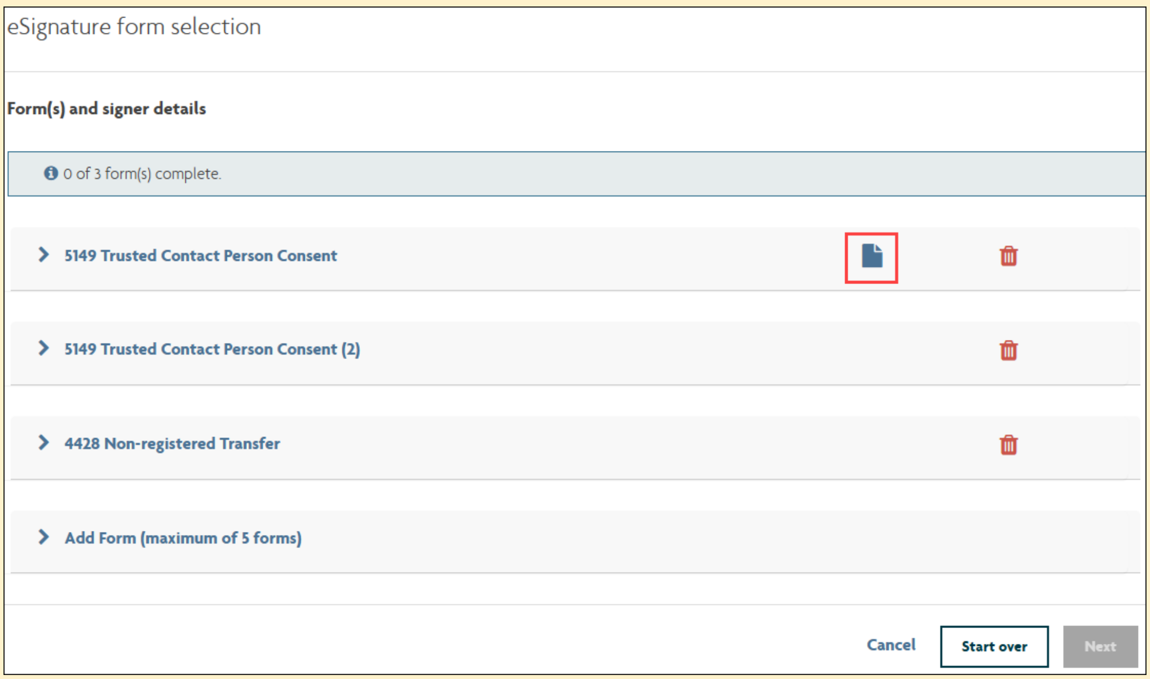
Complete the forms

The form launches and you must complete it.

1. Confirm the signer data added in the previous steps.
2. Type the applicable information into the fields on the form.

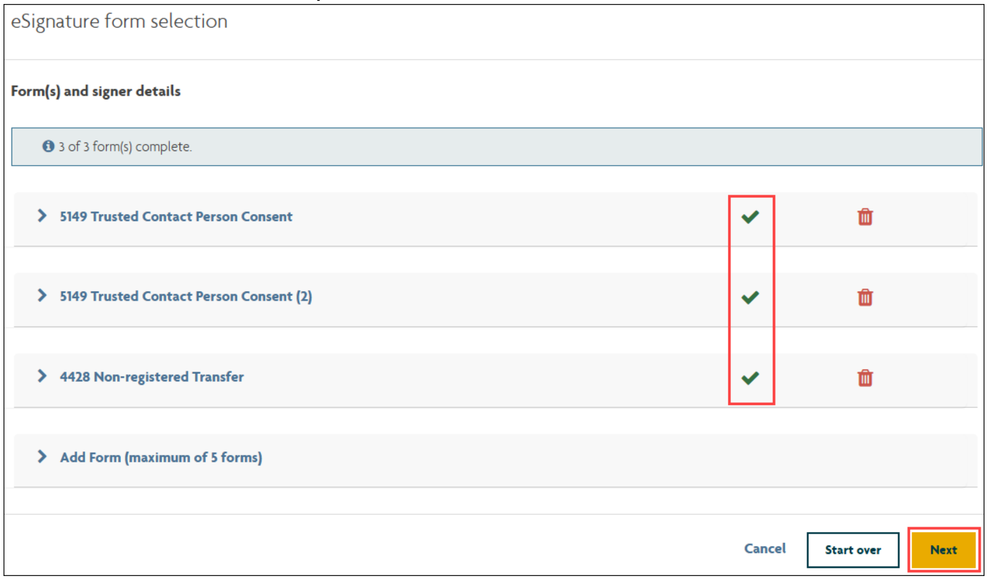
Tips!

- The form will not indicate the required fields when it opens. However, if a required field is missed and you select **Submit**, the required fields will be highlighted. You can select **Submit** before you enter the information. This will allow you to see all the required fields.
- If you are not done completing the form and want to come back to it later, click **Save as Draft**. The form(s) and signer details page appears again, and a draft icon appears beside the form you've saved as draft. To reopen the form and continue, open the twistie and click **Launch form**.



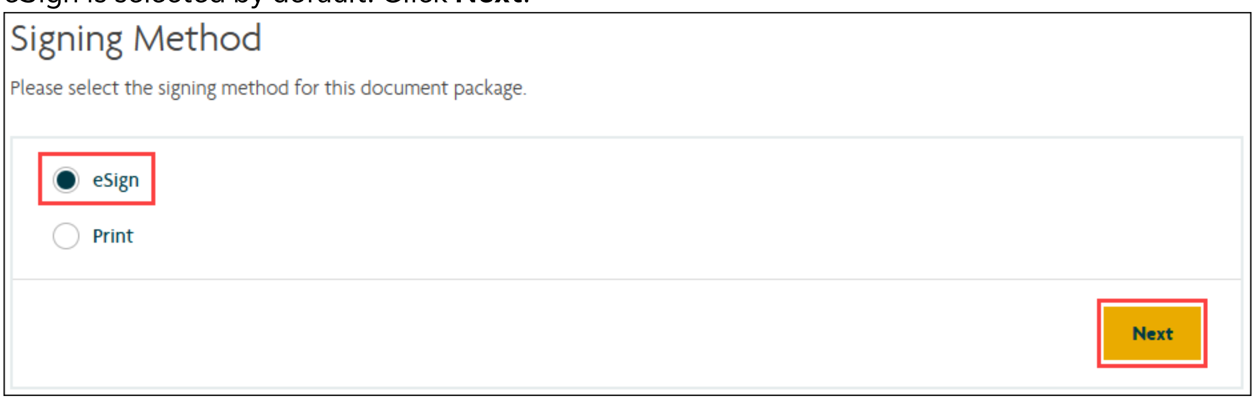
3. Double-check the form is complete prior to submitting. Click **Submit**.
4. Repeat the steps to fill out the roles, names and form for each form.

5. When all forms are completed, click **Next**.



Select Signing method

eSign is selected by default. Click **Next**.



Verify signer details

On this page, you'll:

- select the eSignature type: **In-person** or **Remote**
- select the **delivery method** of fully signed packages
- have the option to **Add Supplementary** document
- have the option to **Request attachment** (for remote only)

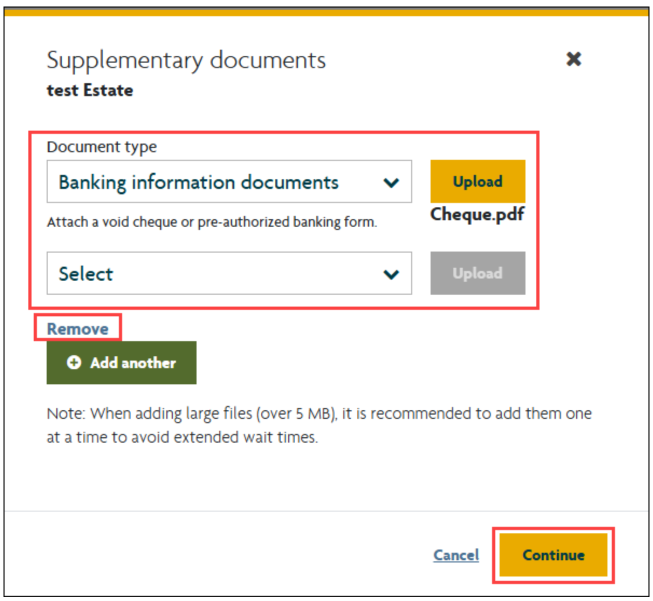
Examples of Supplementary documents:

- Void cheque
- Relinquishing Institution
- Spousal Authorization/Consent

The next section covers the **In-person** process. If you want information on the **Remote** process, skip to that section.

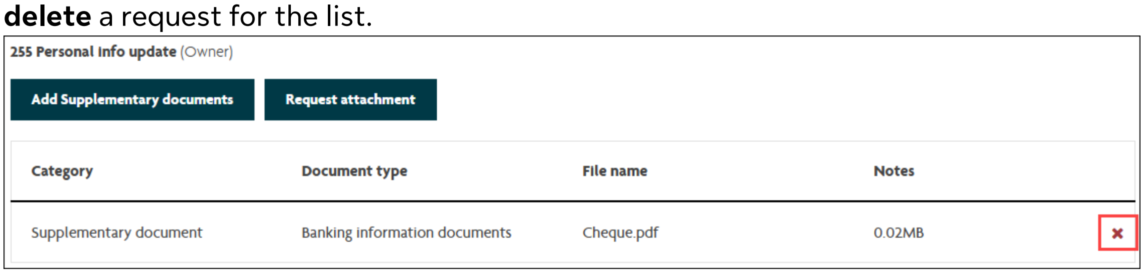
Verify signer details – In-person

1. From the **Client details** section:
    a. Under **eSignature type**, select **In-person**.
    b. Under **Delivery method for fully signed package**, select **Email and passcode** or **Email and security question** and enter/confirm the appropriate details.
    c. If you want to add additional documents the eSignature package, under the appropriate form, click **Supplementary Documents**. The signer(s) will be presented these document(s) during their eSign session:
        i. From the **Documents type** drop-down list, select the applicable option, and click **Upload**.
        ii. In the new window, locate the required document, and click **OK**. You can only upload PDF or JPG files.
        iii. If you need to add more documents, click **Add another** and follow steps i and ii above.
        iv. Click **Continue**.



Tip! To remove a Supplementary document, click **Remove**.

v. The **Supplementary documents** for each form are listed. You can also **delete** a request for the list.



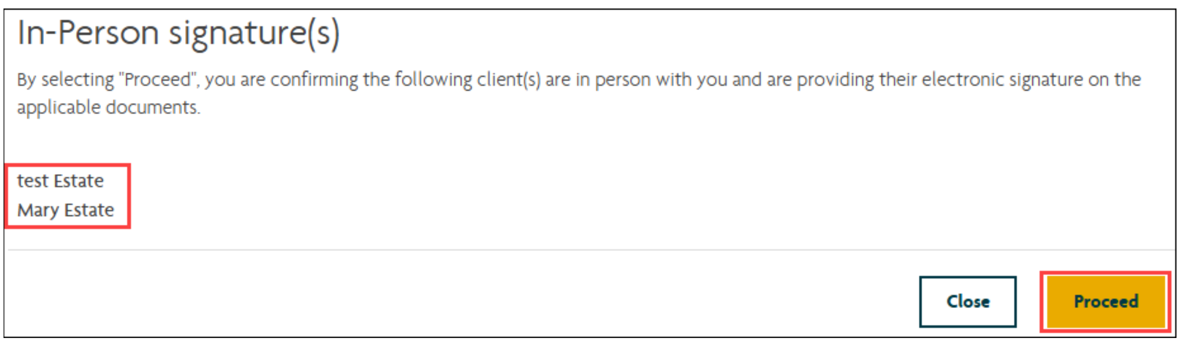
i. Repeat steps i to v for each signer.

Tip! The **Advisor details** section only displays when the Advisor is required to sign the form.

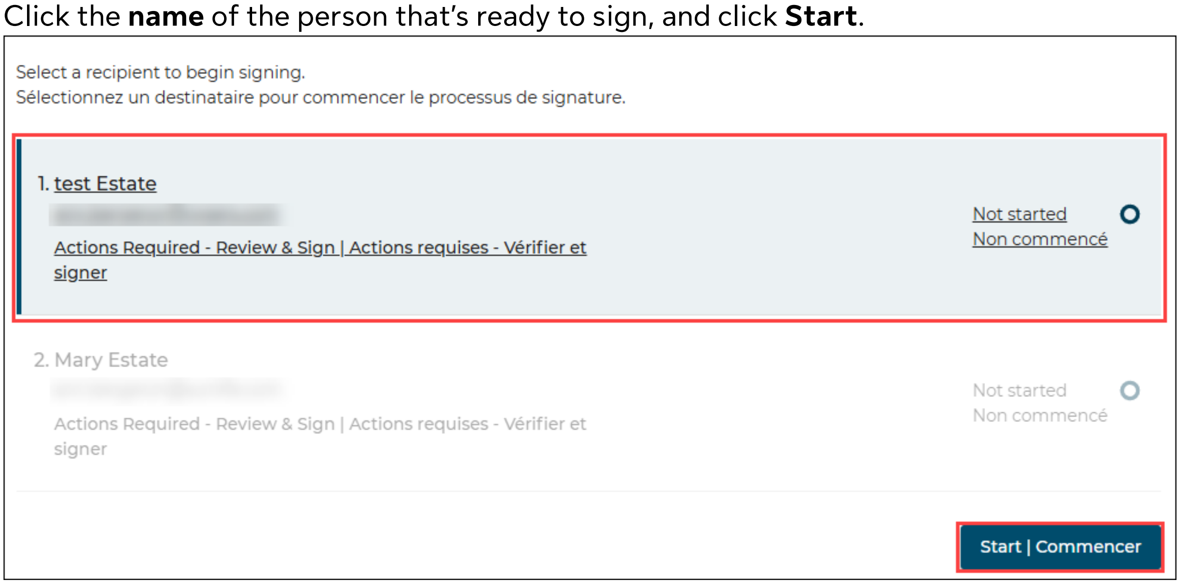
1. If the advisor is required to sign the form, they must sign using **Remote** eSignature.
2. If the advisor is uploading document(s) to the eSignature package (only available if Advisor signature is required), click **Attachments** (the advisor will be asked to upload document(s) during the eSign session; after they have eSigned the form):
   a. From the **Attachment type** drop-down list, select the applicable option. If selecting
   Other documents, in the textbox, enter the document type the Advisor is to upload
   during their eSign session.
   b. If needed, click **Add another**, to request additional documents and follow step a above.
   c. Click **Continue**.

   d. Click **Send package**.

2. The **In-Person signature(s)** page confirms who's signature you need to collect. Click **Proceed**.

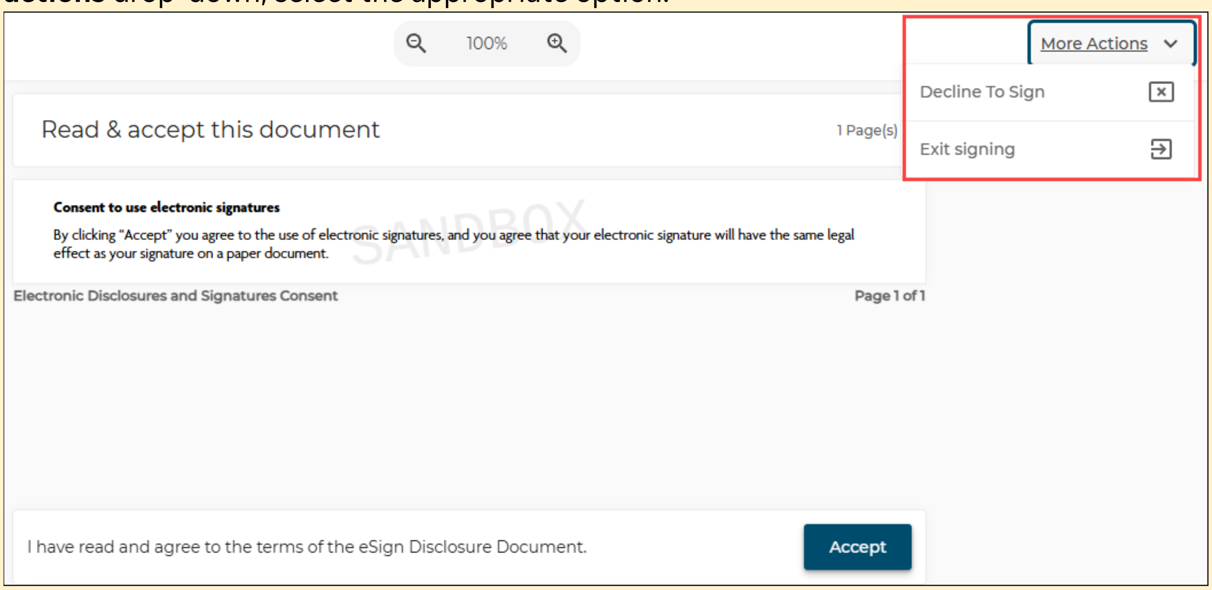


3. Click the **name** of the person that's ready to sign, and click **Start**.



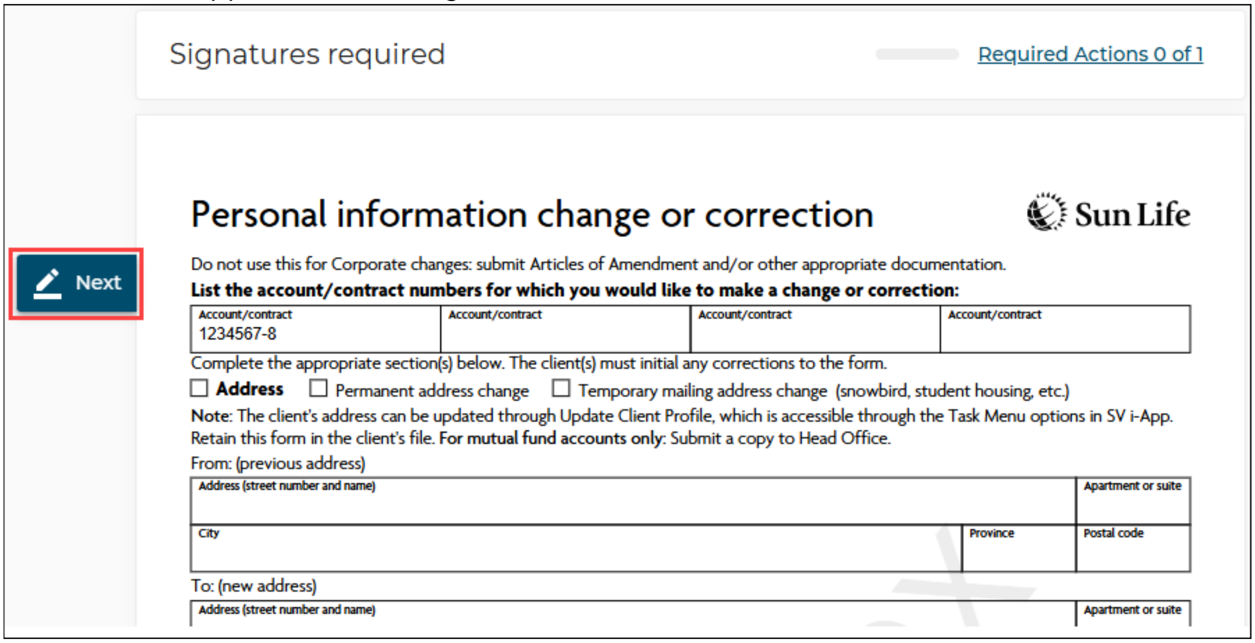
4. Ask the signer to read the page, and click **Accept** to confirm they've read and agree to the terms of the eSign Disclosure Document.

Tip!
If the person wants to decline to sign or wants to exit signing at this point, from the **More actions** drop-down, select the appropriate option.

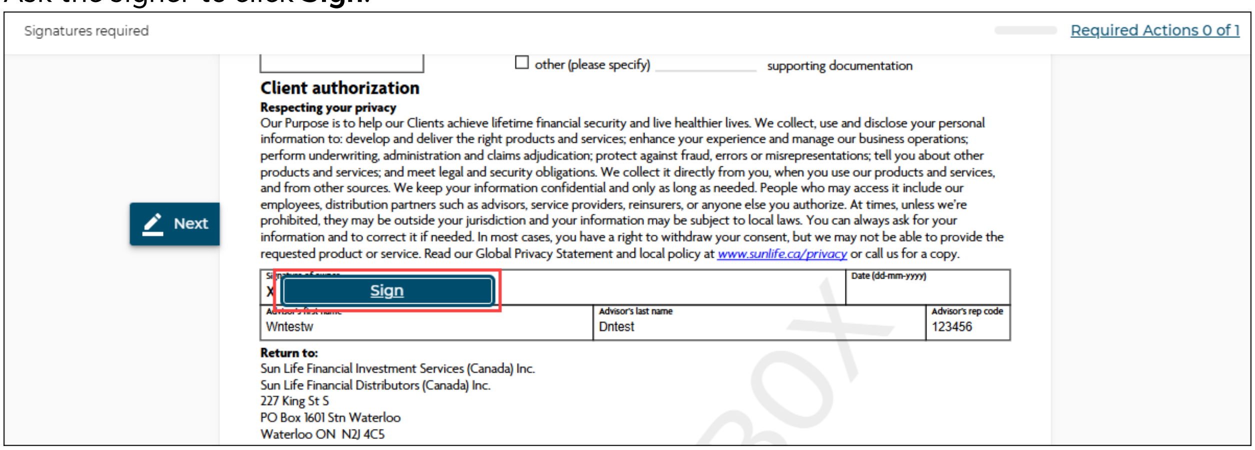


5. The **Review Document** page appears if you've added a **Supplementary document**. Ask the signer to review the document and click **Next**.

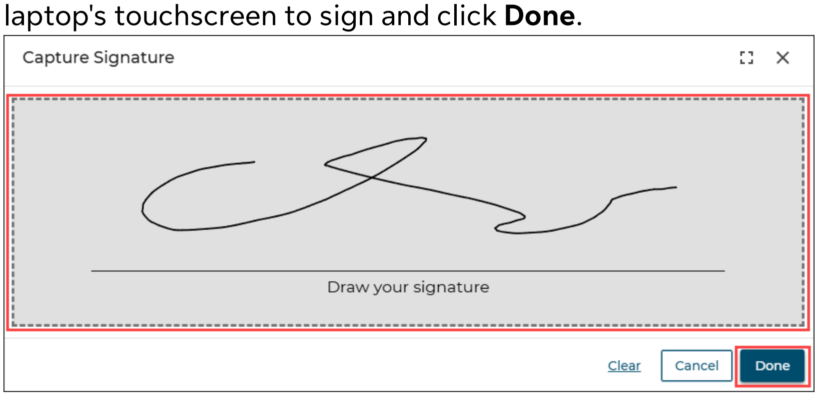
6. The first form appears. Ask the signer to review the document and click **Next**.



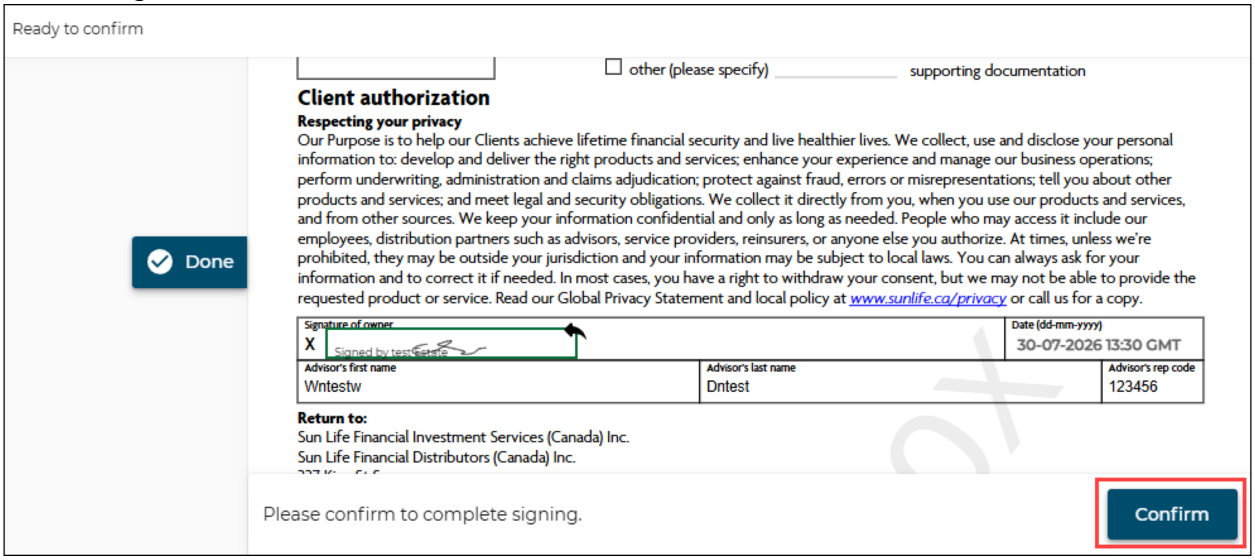
7. Ask the signer to click **Sign**.



8. Under the **Capture signature**, ask the signer to use the mouse/ePen or their finger on the laptop's touchscreen to sign and click **Done**.



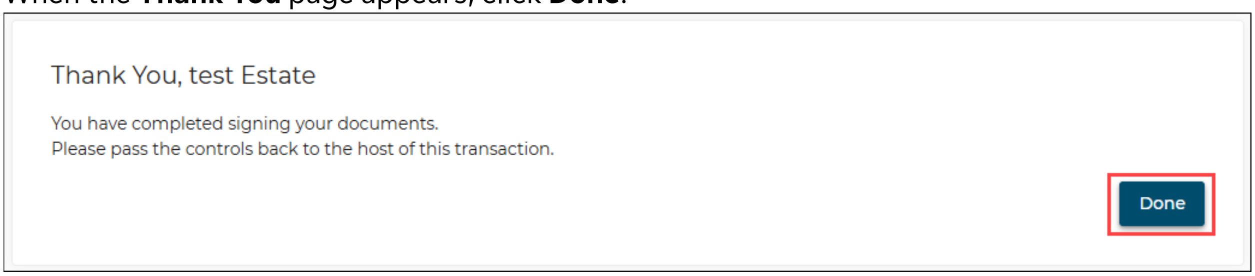
9. Ask the signer to click **Confirm**.



10. Repeat these steps for each document/form displayed.

> **Tip!** The signer will only have to capture their signature once. The others times, they'll just click **Sign** and their signature will automatically be added.

11. When the **Thank You** page appears, click **Done**.



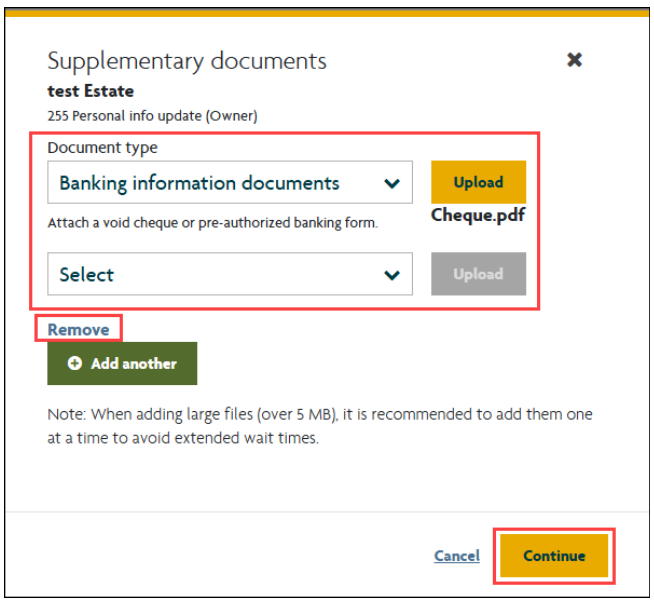
12. Repeat steps 3 to 11 above for each signer.
13. The Signature Centre dashboard will open to display the package(s). The signers receive an email from Sun Life where they can **review and download the signed documents**.

> **Tip!** For instructions on how the signer can review and download the signed documents, see the information in the Sun eApp training roadmap as the information is the same. Click here for the detailed experience and scroll to the **In-Person** or **Remote** sections.
>
> The signer receives one email instead of multiple. Based on the category you've selected for the package, **Market-based investments**, **Individual Insurance** or **Guaranteed Investments** will be included in the title of the email instead of the form name.

14. Go to the Signature centre section.

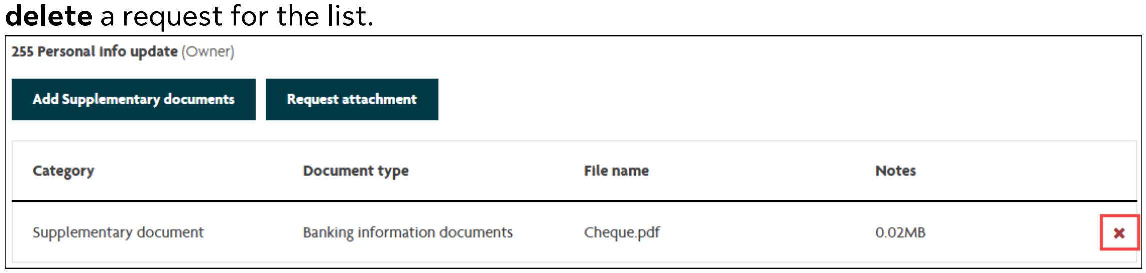
Verify signer details – Remote

1. From the **Client details** section:
    a. Leave the **eSignature type** default option selected: **Remote**.
    b. Enter the signer's **Email Address** and **Mobile number**.
    c. If you want to add additional documents the eSignature package, under the appropriate form, click **Supplementary Documents**. The signer will be presented these document(s) during their eSign session:
        i. From the **Documents type** drop-down list, select the applicable option, and click **Upload**.
        ii. In the new window, locate the required document, and click **OK**. You can only upload PDF or JPG files.
        iii. If you need to add more documents, click **Add another** and follow steps i and ii above.
        iv. Click **Continue**.



Tip! To remove a Supplementary document, click **Remove**.

        v. The **Supplementary documents** for each form are listed. You can also **delete** a request for the list.



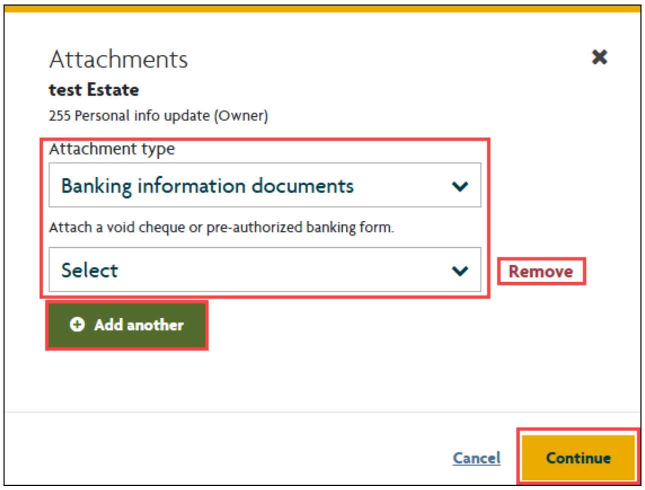
    d. If you are **requesting documents from the signer**, under the appropriate form, click **Request attachment**. The signer(s) will be asked to upload document(s) during their eSign session after they have eSigned the form:

i. From the **Attachment type** drop-down list, select the applicable option. If selecting **Other documents**, in the text box, enter the document type the signer is to upload during their eSign session.

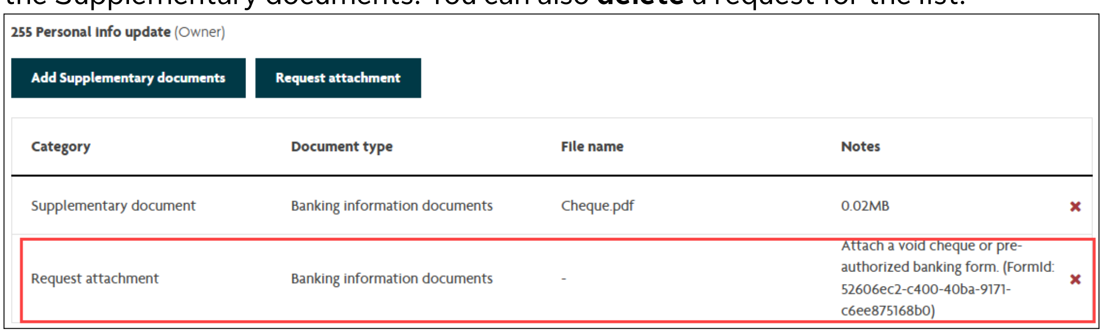
ii. If you need to request other documents, click **Add another** and follow steps i above.

Tip! To an attachment request, click **Remove**.

iii. Click **Continue**.



iv. The **Requested attachment** requested for each form are listed along with the Supplementary documents. You can also **delete** a request for the list.



Tip! The **Advisor details** section only displays when the Advisor is required to sign the form.

- If the advisor is required to sign the form, they must sign using **Remote** eSignature.
- If the advisor is uploading document(s) to the eSignature package (only available if Advisor signature is required), click **Attachments** (the advisor will be asked to upload document(s) during the eSign session after they have eSigned the form):
  a. From the **Attachment type** drop-down list, select the applicable option. If selecting **Other documents**, in the textbox, enter the document type the Advisor is to upload during their eSign session.
  b. If needed, click **Add another**, to request additional documents and follow step a above.
  c. Click **Continue**.

e. Click **Send package**. An email will automatically be sent to the signer(s) letting them know documents are awaiting their signature. The Signature Centre dashboard will open to display **All packages**.

> **Tip!** The **Signer's eSignature experience** is the same as the one for Sun eApp. They will receive one email instead of multiple. Based on the category you've selected for the package, **Market-based investments**, **Individual Insurance** or **Guaranteed Investments** will be included in the title of the email instead of the form name. Click here for the detailed experience and scroll to the **In-Person** or **Remote** sections.
>
> If you've added **Supplementary documents**, they will be displayed before the signer signs the form. If the documents are incorrect, the signer shouldn't sign.

Signature centre

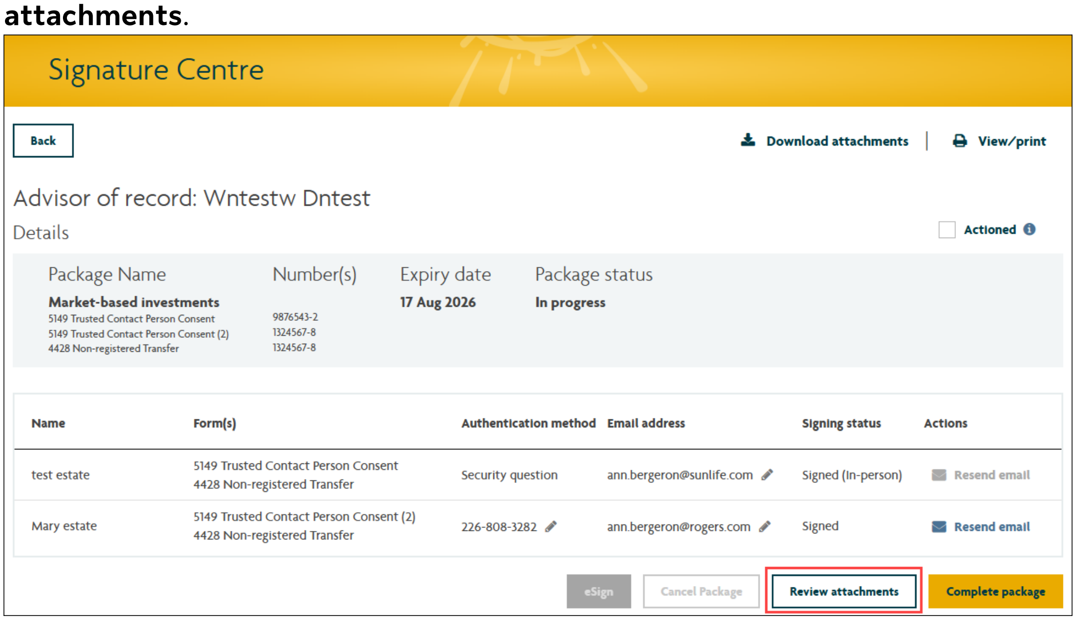
The Signature Centre dashboard is a tool that allows you to view and manage the electronic signature package and view status of documents and attachments (if requested) that have been submitted via the various eSignature tools.

For this user guide, below you'll find a few things you should know:

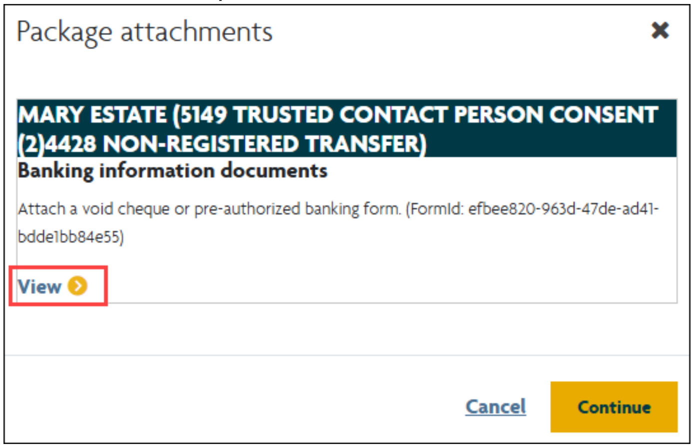
Completing a package when you've requested attachments package

For remote signing, if you've requested attachments, once the signature(s) are completed, you must review the document attached by the signer. This is required to ensure the attachments are correct and is needed to complete the package, so it doesn't expire.

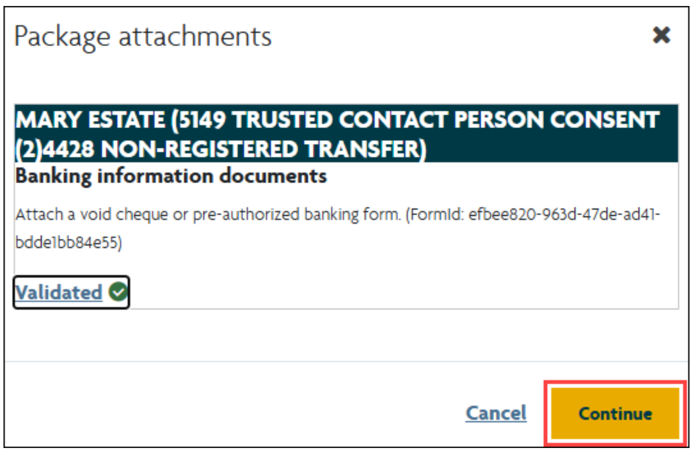
1. From Signature centre, go to the **Details** page of the package and click **Review attachments**.



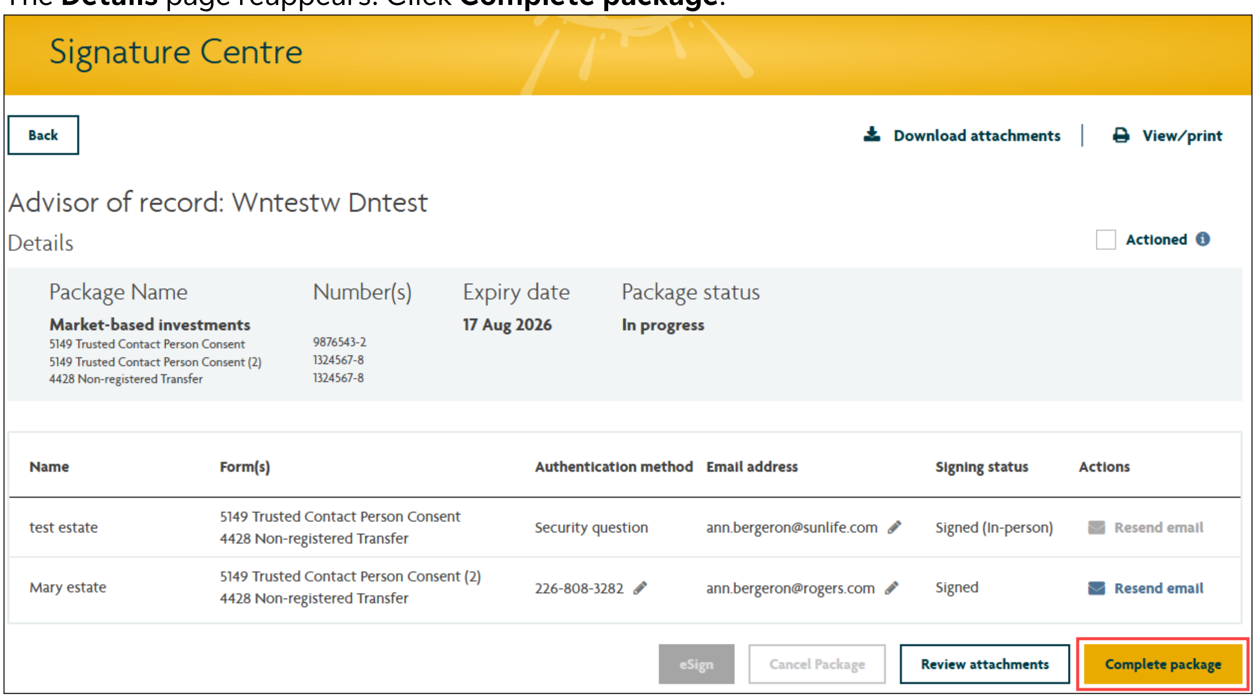
2. A new window opens. Click **View** to view what the signer attached.



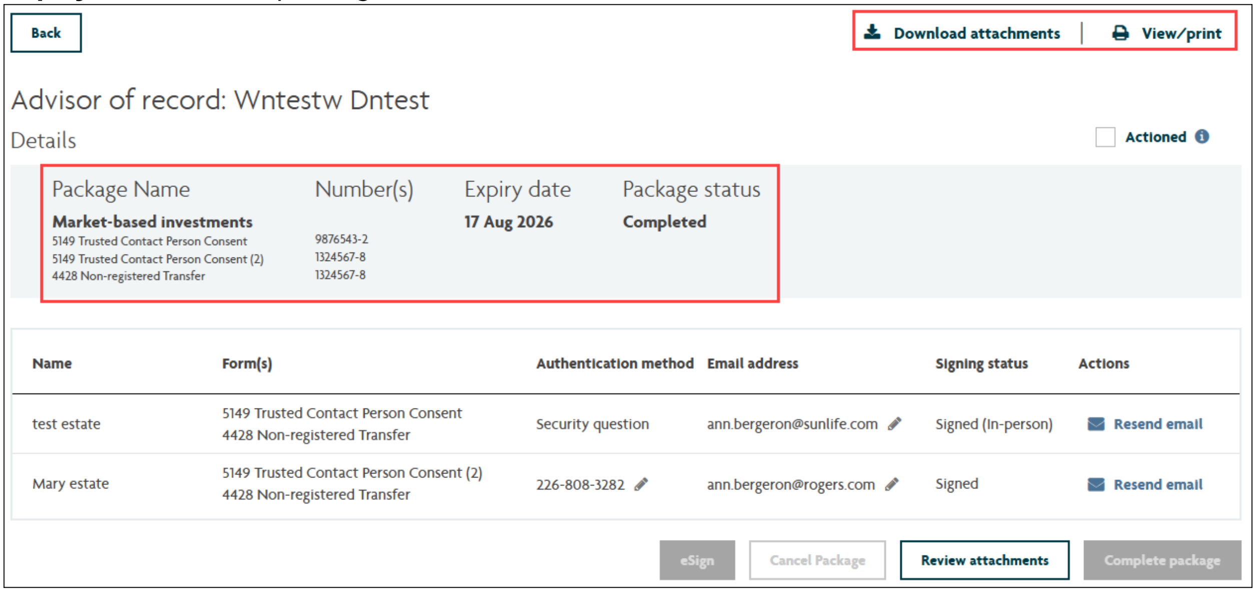
3. The attachment downloads. After verifying the correct document was attached, click **Continue**.



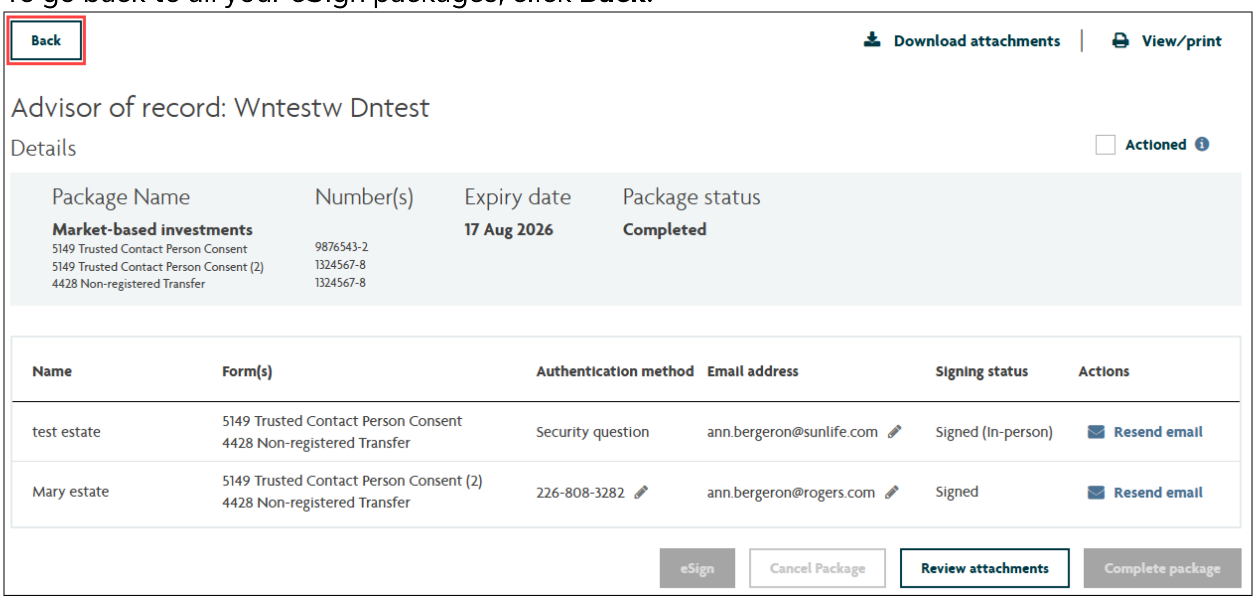
4. The **Details** page reappears. Click **Complete package**.



5. From this page, you can **Download attachments** or **View/print the forms/documents** to view the details of the package including which **forms** were signed, which **numbers**, the **expiry date** and the package **status**.



6. To go back to all your eSign packages, click **Back**.

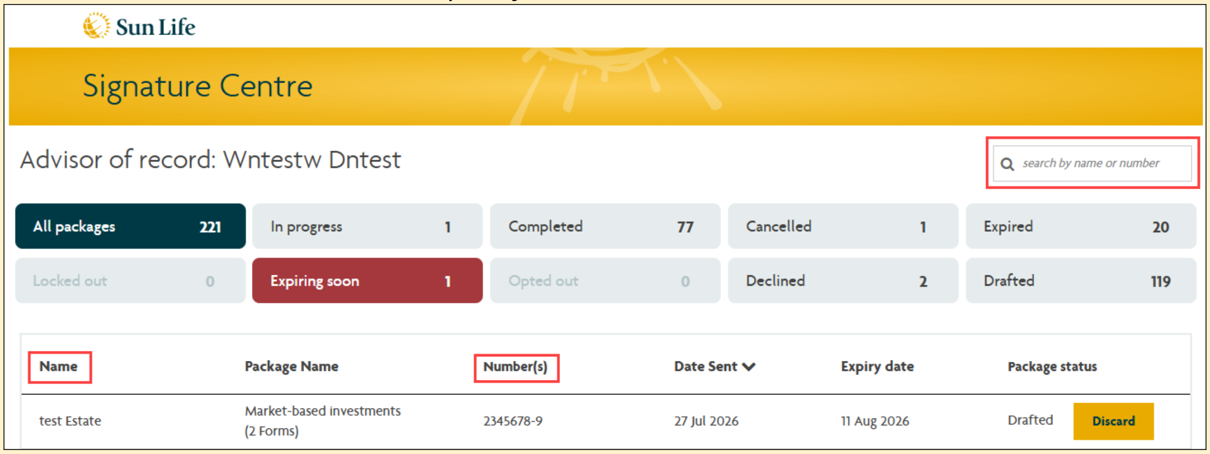


Retrieve a draft package

If you've **saved** a package or clicked **Start over**, the package is saved in Signature centre. To retrieve it:

1. From Signature centre, select the appropriate package.

Tip! To easily find your package, use the **Search by name or number** field to Search by Client name or account/contract/policy number.



2. From the **Form(s) and signer details** page, continue to fill out the forms as outlined in the previous section.

Tip! When you include one form only in a package, you are taken directly to the form where you can continue to fill it out.

Where can I get help?

- Multi-form package demo video <coming soon>
- For questions or issues, reach out to the Advisor Experience Team:
  1-800-800-4SUN (4786) Press 1-3-3 or email: advisorexperienceteam@sunlife.com