

# Sun eApp eSign Process

1. When you are ready to send the application to the Client for signature, click on the Open button.

▼ SunTerm: Testing Client ⌚ Signature process pending

Policy number: AA00,246-2

Application - AA00,246-2

Attachments 0 file(s) attached [Manage Attachment](#)

- Attach supporting documents for this policy, such as illustrations, proof of identity, disclosure forms and more.

Items to complete	Status	
eSign	<input type="radio"/> Not complete	<input type="button" value="Open"/>

2. Next, you will be asked to verify sign or details. Once you have verified the email and password:

- a. If the client is with you, select In-person.
- b. If the client is remote and this is a non face to face application, select Remote.

Testing Client (Owner, Insured)

**eSignature type**

In-person  Remote

**Delivery method for fully signed package**

Email and passcode  Email and security question.

Email Address

Mobile number

**Note:** if you have more than one Client that needs to sign, they must have a unique mobile phone number and email address.

3. Then click Send package.

Any changes to contact information will not be saved after the package is signed.

4. You will now see the status changed to "In progress."

▼ SunTerm: Testing Client ⌚ Signature in progress

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Items to complete	Status	
eSign Initiated Jan 04, 2021	<input checked="" type="radio"/> In progress	<input type="button" value="Open"/> <input type="button" value="Manage details"/>

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- 5.** The Client will receive an email asking them to eSign. Once they click on the Sign my documents button in the email, they'll receive a text message with a passcode on their phone.

**EXAMPLE:**

Hello Testing Client

The New SunTerm Life Policy package is ready for your signature. Select 'Sign My Documents' once you are ready to continue.

A passcode will be sent to your mobile phone when you select the button. Use this passcode to access your documents. If you have any questions, please contact your advisor, Sheldon Rice, at (800) 555-1851. They are here to help.

**SIGN MY DOCUMENTS**

Sincerely,  
The team at Sun Life

\*Please do not reply to this email. This inbox is not monitored.\*

- 6.** After the Client receives the passcode, they will click Login.

Sun Life Financial

Financière Sun Life

Guest Login

Please use the passcode sent to your mobile phone for secure access to your eSignature package.

SMS Passcode

Login

- 7.** The Client will need to review the consent and click Accept to sign the application.

Opt Out Decline

### Electronic Disclosures and Signatures Consent

Must be accepted and agreed to before starting the signing process.

Not accepted

This is a consent Document. You must read it and click the Accept button at the end of the Document.

**Consent to use electronic signatures**

By clicking "Accept" you agree to the use of electronic signatures, and you agree that your electronic signature will have the same legal effect as your signature on a paper document.

Opt Out

- 8.** They can now click the arrow tab and go directly to the Sign in section or scroll down to verify all the details.

Opt Out Decline Confirm

### New SunTerm Life Policy

My signatures 0 / 1

Please review and sign this Document by scrolling and clicking on the "Click to Sign" or "Click to Initial" boxes.

Sun Life

#### Electronic declaration and authorization for insurance application

Advisor name: Sheldon Rice  
Advisor code: 017491  
Policy number: AA00,246-2  
Application date: December 23, 2020

#### Client details

Testing Client

Involvement: Owner, Insured

Personal information: Date of birth: January 1, 1980, Male; Province of residence: Ontario

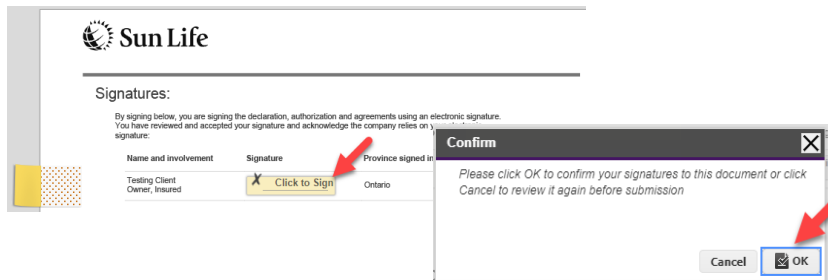
#### Product details

Testing Client

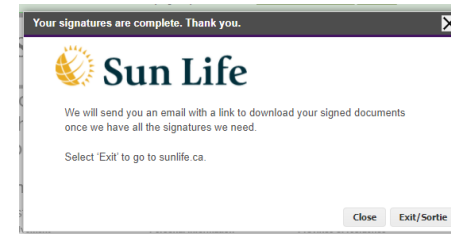
Product: SunTerm \$500,000  
Coverage: Term 20 term

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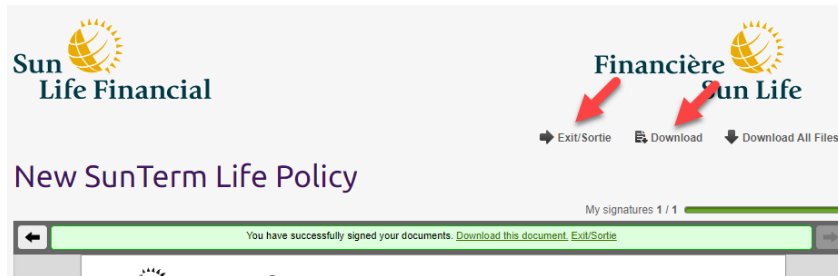
- 9.** Once they are at the signature section, they will need to click on Click to Sign.



- 10.** They can now click the arrow tab and go directly to the Sign in section or scroll down to verify all the details. They have now signed the application and can click Exit.



- 11.** On the next screen, they can click Download to receive a copy of their signed application.



- 12.** If you still have the application open in Sun eApp and used Remote signing, you will need to close and re-open the application to see the updated status. Otherwise, you will now see the eSign status change to completed. Now you can complete the Advisor's report and Advisor declaration to submit the application.

