Form selection tool user guide

ABSTRACT
This user guide will provide systematic instructions for how to use remote eSignature on forms

Click the step in the process below or review the document in its entirety by scrolling down.

The advisor's Marketing assistant can complete the below steps with the exception of signing (i.e. cannot complete steps seven and eight). The Client(s) and Advisor of Record (AOR) must complete their own signing.

Process

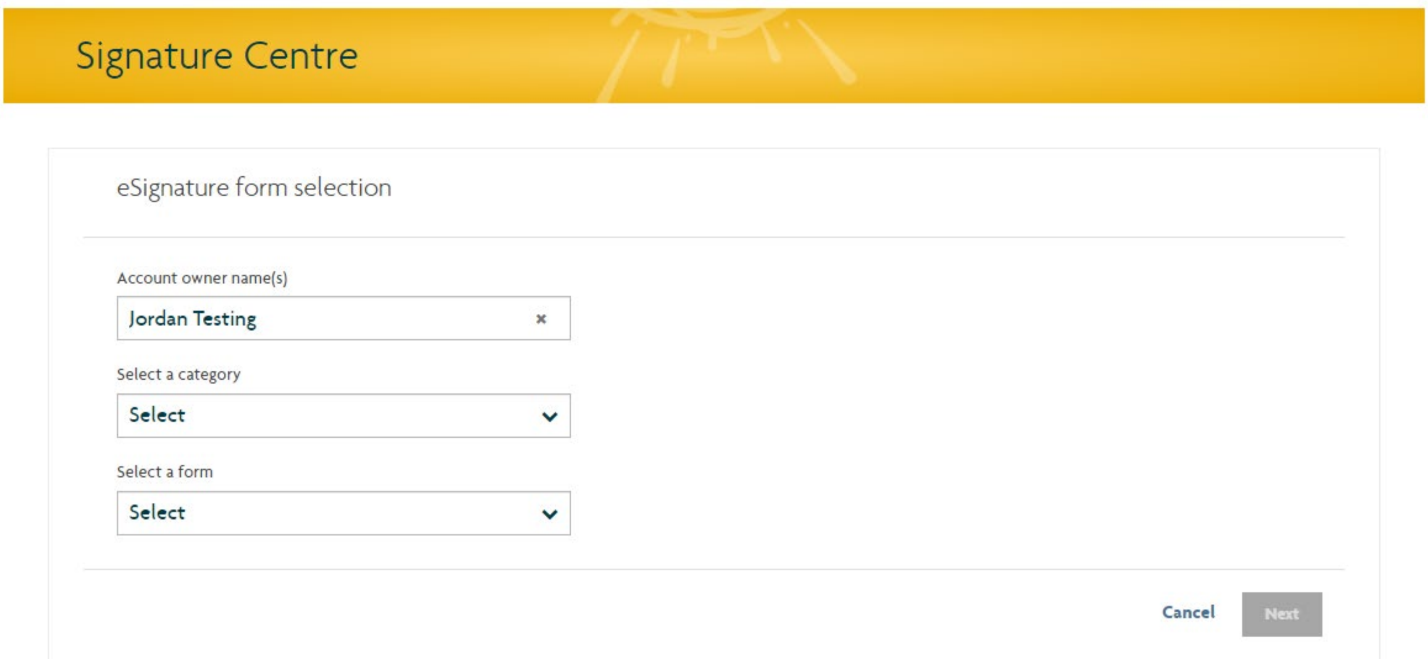
NOTE: Screenshots are for informational purposes only and may display different forms/product types.

STEP ONE – ACCESS THE FORM SELECTION TOOL

1. From the Sun Life Advisor site, click eSignature Form selection tool. From the landing page that appears, select the appropriate button based on the Client's language preference: English or French

STEP TWO – SELECT THE eSIGNATURE FORM

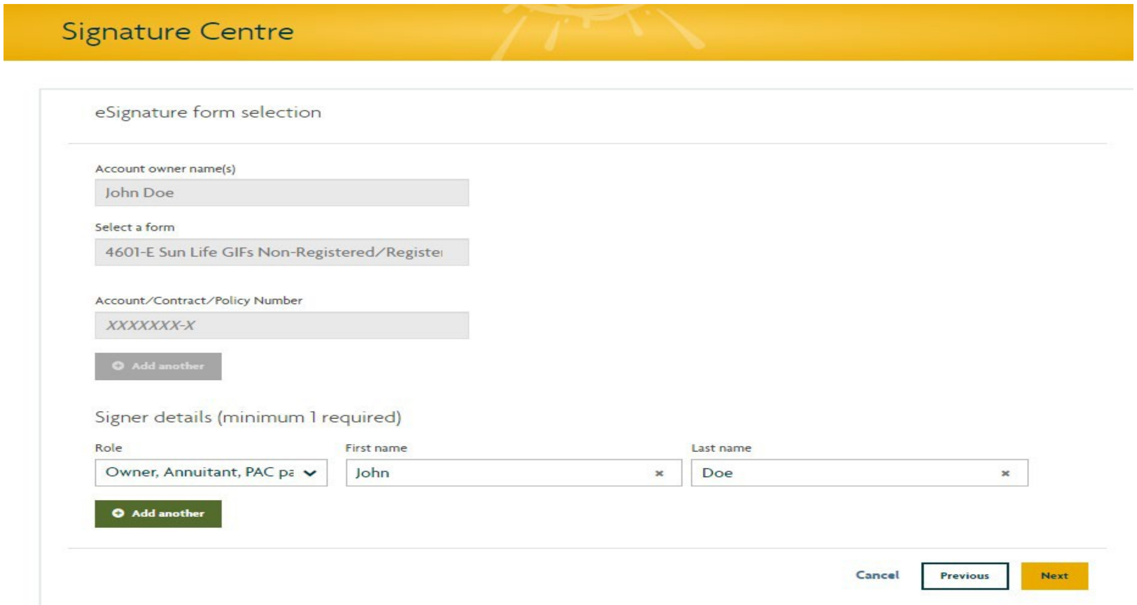
1. In the Account owner name(s) field, enter the name of the account owner or account owners.
2. From the **Select a category** drop down, select the appropriate category.
3. From the **Select a form** drop-down, select the form.
4. Click **Next**.
    - The Cancel button deletes the record and closes this session.



STEP THREE – ENTER ACCOUNT OWNER DETAILS

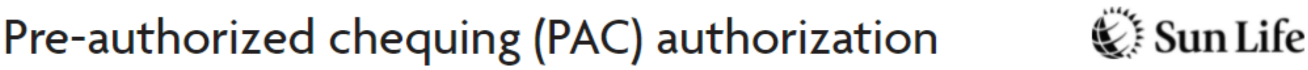
The Account/Contract/Policy number field is not applicable for GIF forms.

1. In the **Account/Contract/Policy number** field, enter the policy number following the format xxxxxxx-x. For example, 1234567-8. If you do not have a policy number leave the field blank.
2. In the **Role** drop-down, select the option for the individual(s) signing the form.
3. In the **First name** and **Last name** fields, enter the name of the signer.
    a. If applicable, click **Add another** button to include additional signers.
4. Click **Next.**



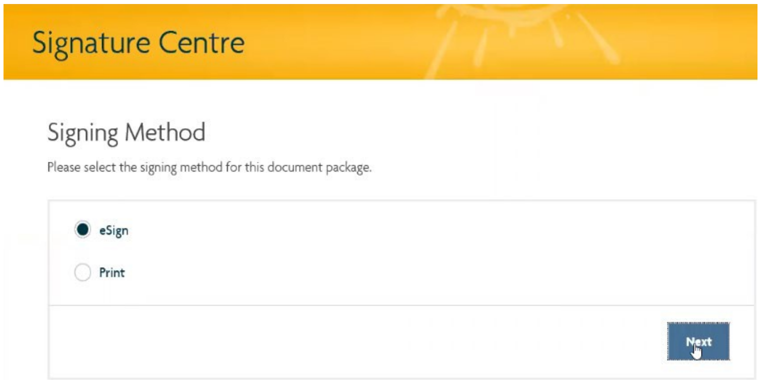
STEP FOUR – COMPLETE THE FORM

1. Type the applicable information into the fields on the form.
    - The form will not indicate the required fields when it opens. However, if a required field is missed and submit is selected, the required fields will be highlighted. Double check the form is complete prior to submitting.
2. Click **Submit.**



STEP FIVE – SIGNING METHOD

1. Leave **eSign** as the signing method.
2. Click **Next**.

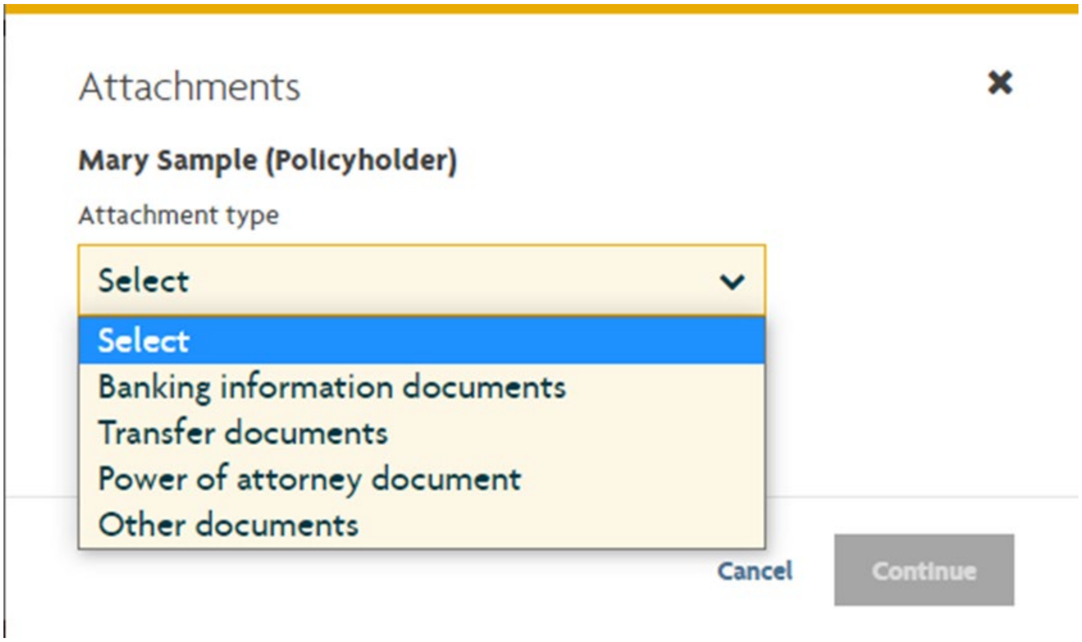


STEP SIX – VERIFY SIGNER DETAILS

1. From the **Client details** section:
    a. Enter the Client(s) Email Address and Canadian Mobile number.
2. Click **Send Package**. An email will automatically be sent to the Client(s) letting them know documents are awaiting their signature. The Signature Centre dashboard will open to display All packages.
    a. If requesting documents from the Client, click **Request Attachments**. The Client(s) will be asked to upload document(s) during their eSign session; after they have eSigned the form:

- From the **Attachment** type drop-down, select the applicable option. If selecting **Other documents**, in the textbox, enter the document type the Client is to upload during their eSign session.
- If needed, click **Add another**, to request additional documents.

b. Click **Continue**.



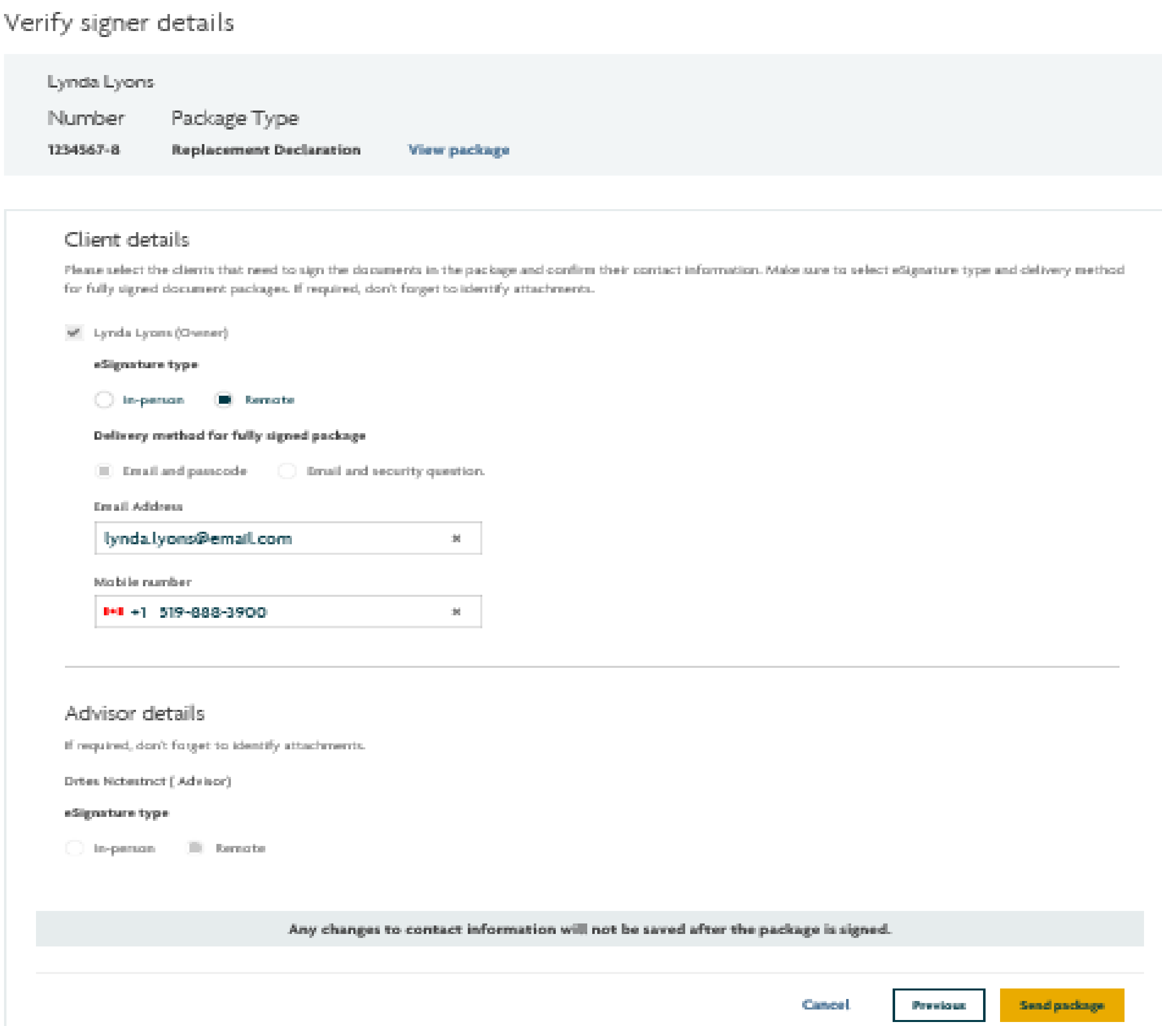
3. The **Advisor details** section only displays when the Advisor is required to sign the form.
   a. If the advisor is required to sign the form, they must sign using **Remote** eSignature.

b. If 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):

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

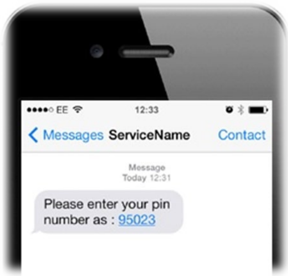
   ii If needed, click **Add another**, to request additional documents.

   iii Click **Continue**.

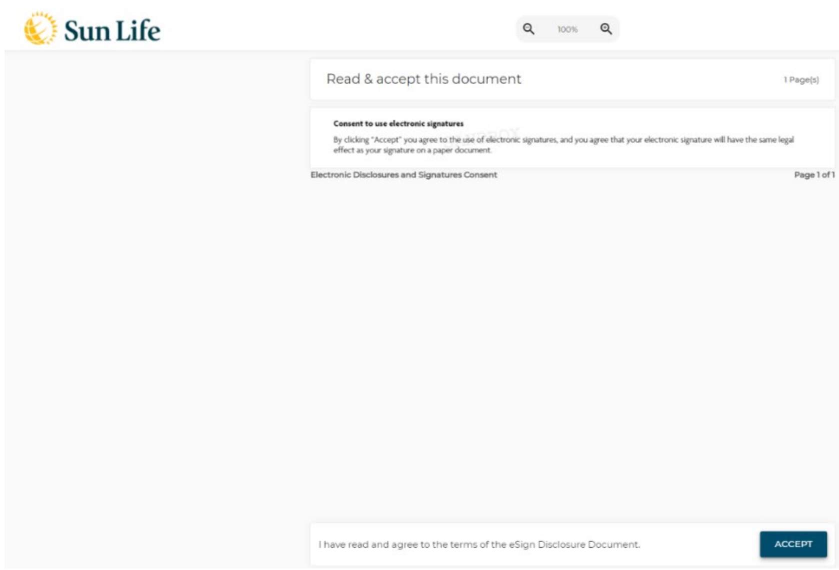


STEP SEVEN – CLIENT(S) SIGNS eSIGN PACKAGE

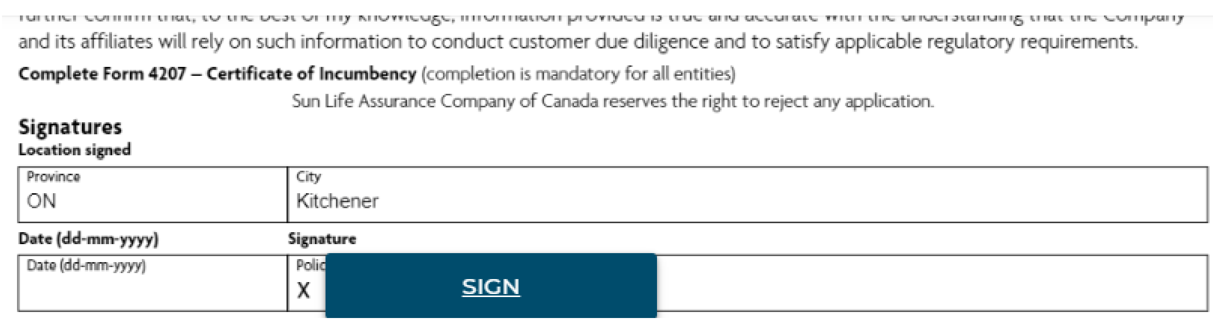
1. Client receives email and clicks **Sign My Documents** to access eSign package.
2. Client receives SMS text message with passcode and enters it on login webpage.



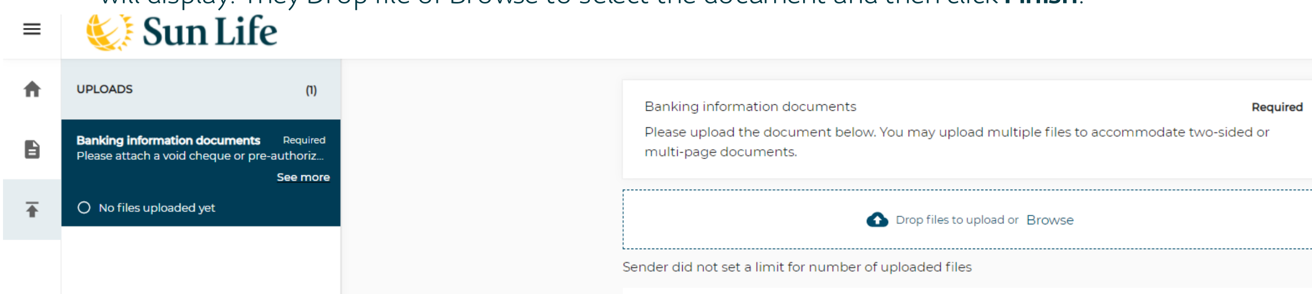
3. Client consents to using electronic signature and clicks **Accept**.

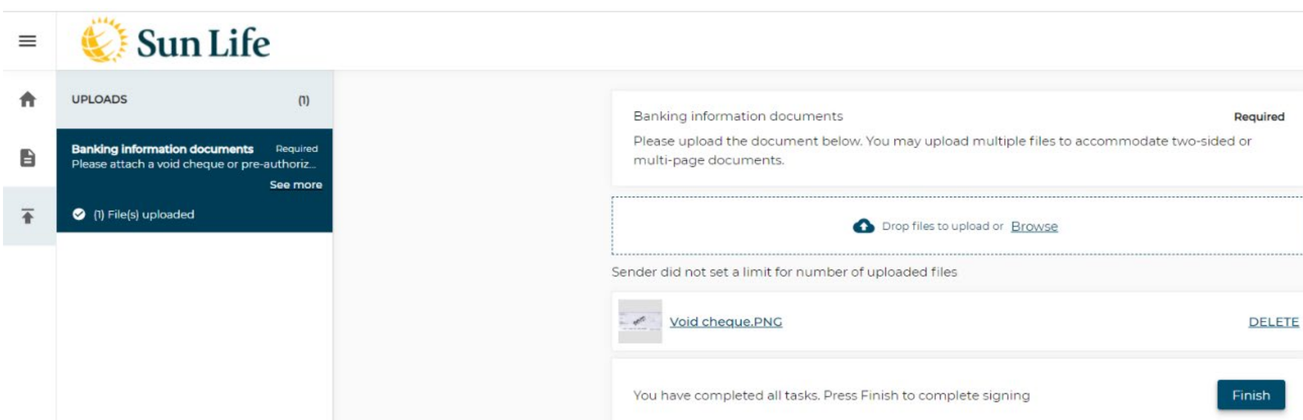


4. Client reviews document(s) and clicks **SIGN**



5. After the Client provides their eSignature, if they have attachments to upload, this screen below will display. They Drop file or Browse to select the document and then click **Finish**.



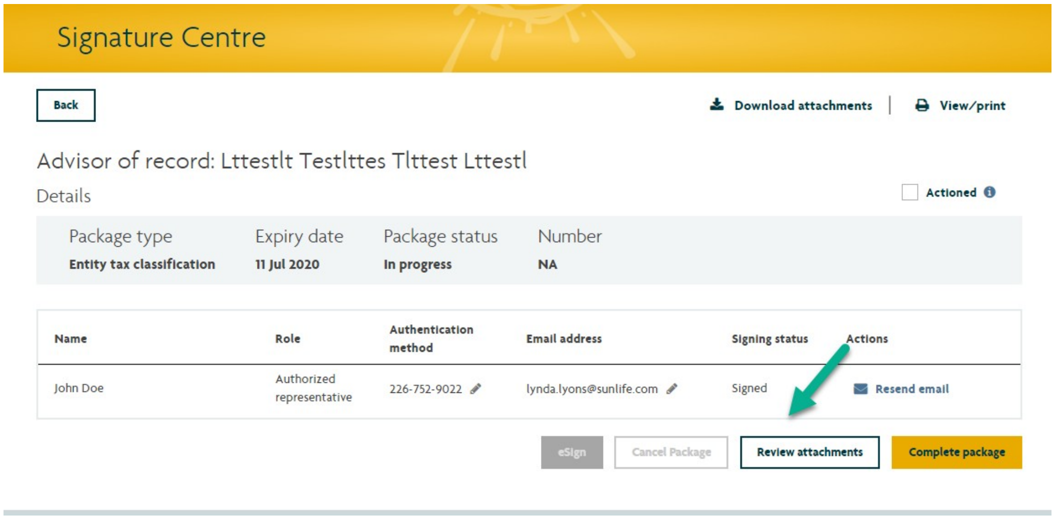


STEP EIGHT – ADVISOR(S) SIGNS eSIGN PACKAGE

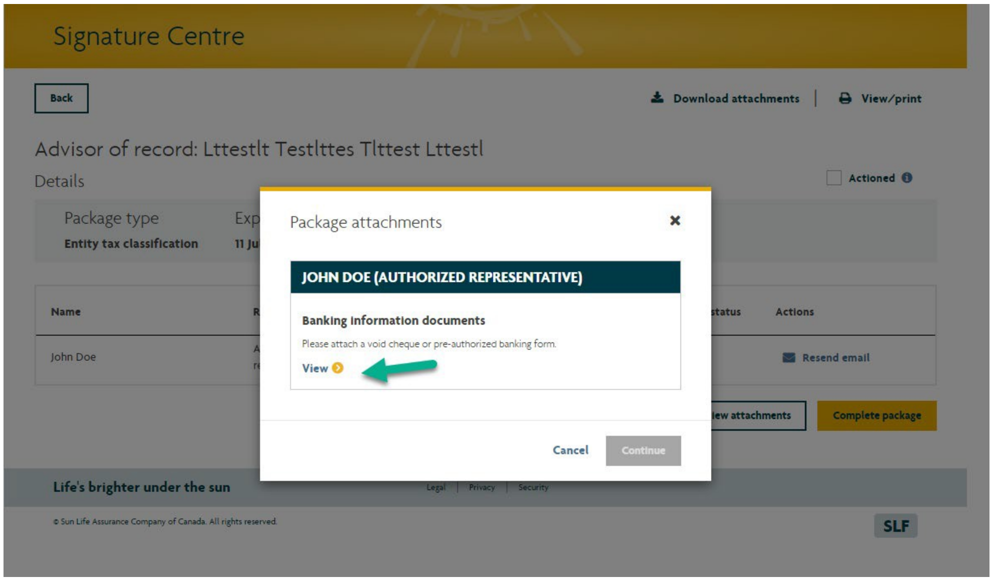
1. After the Client signs the forms, the advisor receives an email and clicks **Sign My Documents** to access eSign package.
2. The advisor consents to using electronic signature by clicking **ACCEPT**.
3. The advisor reviews document and clicks **SIGN.**
4. The advisor and Client receive the download email. To access the package, they both click **Download Signed Documents**. (Alternatively, the advisor can access the signed document through the Signature Centre.) The advisor must send a copy to the MGA and SLGI

   NOTE: If the form does not require the advisor's signature, they will not receive the email requesting their signature and they will not receive an email with the link to download the completed document package. The advisor (or their marketing assistant) will have to monitor the dashboard to make sure the client signs prior to the package expiring. Once the client signs, they can download the documents and send as noted above.

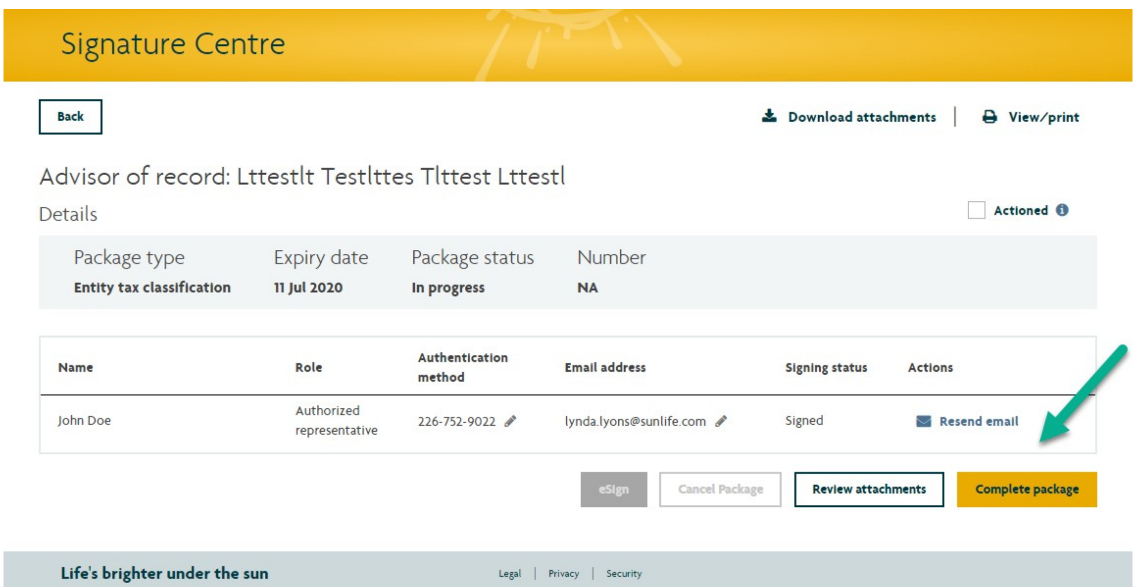
5. If the package contains attachments, once signature(s) are completed, the advisor must go to the **Details** page in Signature Centre and click **Review attachments**. This is required to ensure the attachments are correct and is needed to complete the package so it doesn't expire.



6. After clicking Review attachments, a new window opens, the advisor clicks View, and in this example, you would see the Void cheque attached by the Client.



7. After verifying the correct document was attached, the advisor clicks **Complete package**. The package status will then change to Complete.



STEP NINE – SIGNING COMPLETE

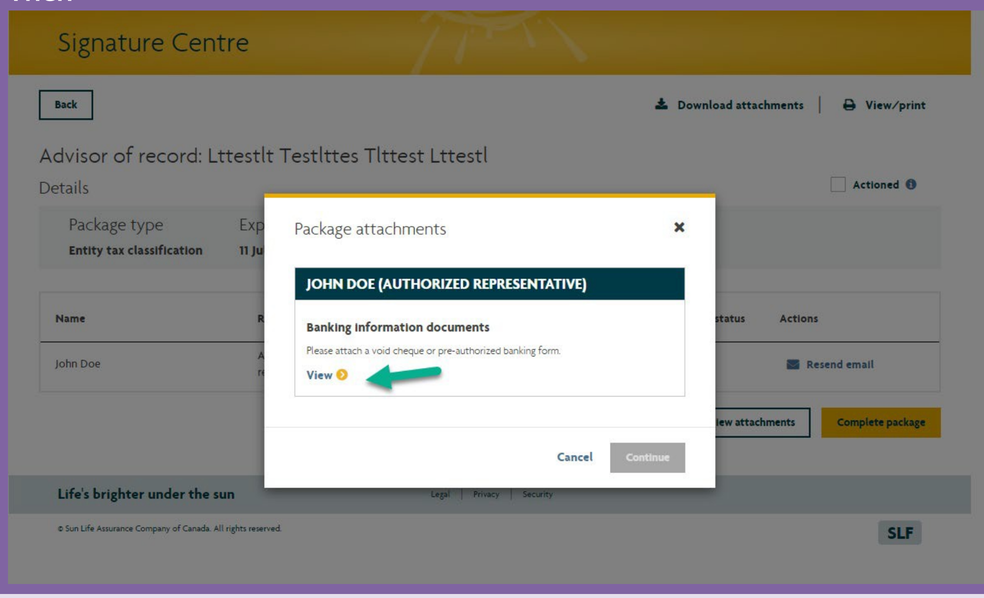
The Client and advisor are notified via email that a copy of the completed signed form is available for download.

1. To determine next step, review the chart based on whether the Advisor was required to eSign the form:

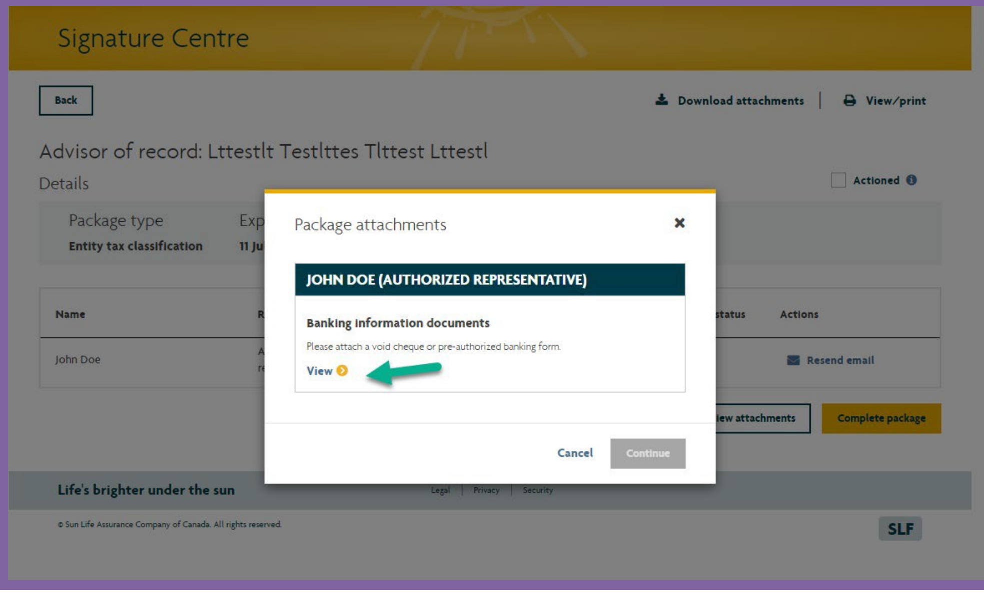
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>Advisor was required to sign</td><td>
a) The Client and Advisor are notified via email that a copy of the complete signed form is available for download.
b) Determine next steps based on the options in chart below:
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>Attachments were requested</td><td>• Proceed to next step.</td></tr>
<tr><td>Attachments were NOT requested</td><td>• A copy of the complete and signed form is automatically sent to head office.
• Download a copy of the form.
• Save a copy of the form in the Client’s file.</td></tr>
</table>
</td></tr>
<tr><td>Advisor was NOT required to sign</td><td>
a) When the Client(s) has signed the form, the Advisor will NOT be notified. Open the Signature Centre to monitor signing completion.
b) Once the Client has signed, determine next step based on the options in the chart below:
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>Attachments were requested</td><td>Proceed to next step.</td></tr>
<tr><td>Attachments were NOT requested</td><td>a) All documents have been sent to head office.</td></tr>
</table>
</td></tr>
</table>

STEP TEN – IF APPLICABLE, REVIEW ATTACHMENTS AND COMPLETE PACKAGE

1. With the **Signature Centre** open, locate the Client's name in the listing and click to open the **Details** screen.
2. Click **Review attachments** (to view the document(s) the Client(s) or AOR attached during their eSign session). The **Package attachment** pop-up window opens to display the name(s) of the individual(s) that were requested to upload attachments.
3. If Client(s) or AOR uploaded documents, click **View** to open the attachment. Review the document to ensure it is valid. Complete this step for each document attached. Once all attachments have been reviewed, click the 'x' in the top right corner of the 'Package attachments' pop-up window.
4. Determine next step based on the options in the chart:



If	Then
Attached document(s) are valid	a) Click **Complete Package**. A copy of the completed and signed form, including attachments is automatically sent to head office. b) Click **View/Print** to save a copy of the complete signed form. c) Click **Download attachments** to save a copy of the document(s). d) Save a copy in the Client's file.
Attached document(s) are NOT valid OR the document(s)	a) Click **Complete Package**. A copy of the completed and signed form is automatically sent to head office. b) Click **View/Print** to save a copy of the complete signed form. c) Save a copy of the form in the Client's file. d) Ask the Client to send a copy of the document(s).

If	Then
	
has NOT been attached	e) Once received, send a copy to head office and save a copy in the Client's file.