

E-SIGNATURE PROCESS

AMERICO SIGNATURE PROCESS

1st email: HIPPA form: Says "Sales Connection via DocuSign"

- Open email
- Review document
- Access code (Last 6 of their social) -Validate
- Accept
- Click the box next to "I agree to use electronic records and signature"
- Click continue
- Click yellow box that says Sign
- Click Select Style
- Adopt and Sign
- Click Finish

2nd email: Application

- Sales Connection via DocuSign
- Review document
- Click first yellow box
- Click Select Style
- Adopt and Sign
- Continue to click yellow boxes for signatures
- Mothers Maiden name in yellow box
- Click Finish

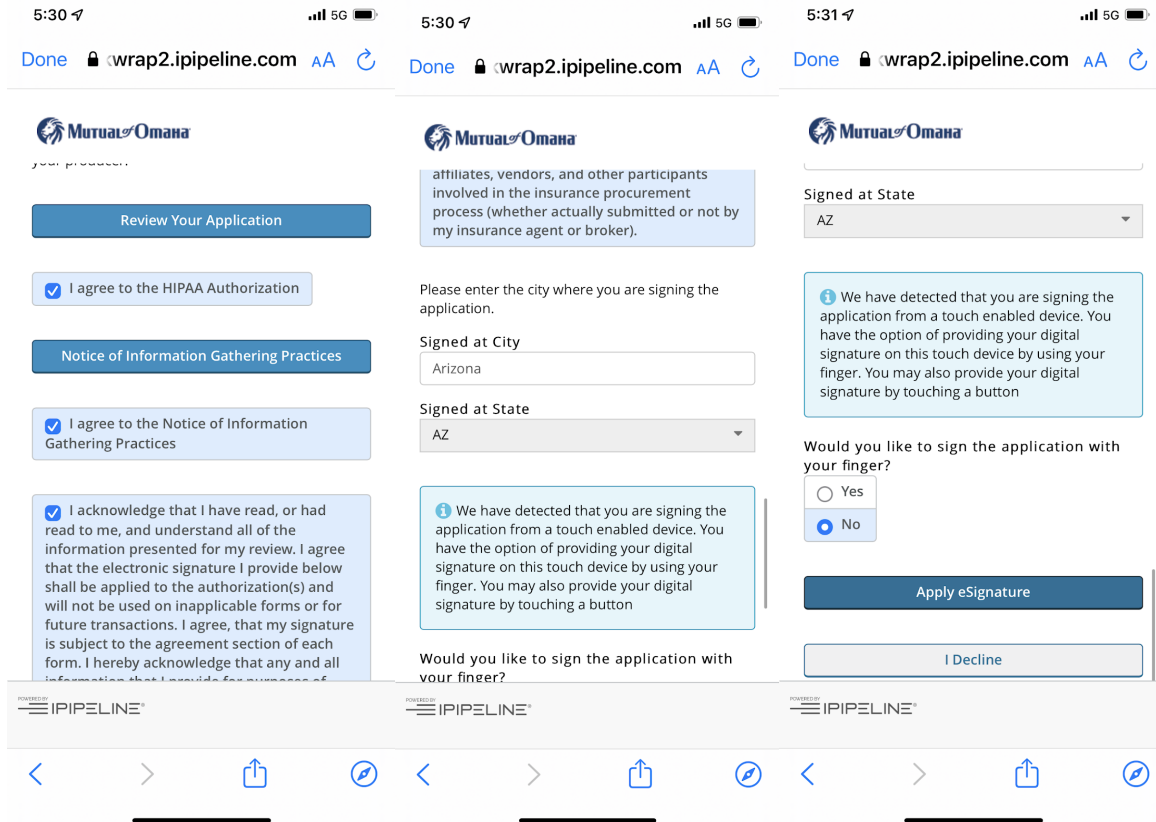
MUTUAL OF OMAHA SIGNATURE PROCESS

1st Email: HIPPA form
says "Action Required on your United of Omaha application"

- Open Email
- Click "Access your application and begin the Esignature process"
- Type in Access code (Last 4 of their social)
- Scroll to the bottom

Pictures below of what client can see:

E-SIGNATURE PROCESS



- Click all three boxes that says “I agree”
- Put the city they signed at in “Signed at City”
- Click “No” to Would you like to sign the application with your finger?
- Click “Apply eSignature”
- Client is done

2nd Email: Application

Email says “Action Required on your United of Omaha application”

- Open Email
- Click “Access your application and begin the Esignature process”
- Type in Access code (Last 4 of their social)
- Scroll to bottom

E-SIGNATURE PROCESS

AIG SIGNATURE PROCESS

- Send email
- Click view dashboard

They will get an email from AIG - DocuSign

- Click review document
- Click don't allow (location)
- Click start (top left)
- Adopt and Sign (2 signatures)
- Finish
- Don't worry about creating login and password for docuSign

Refresh your screen and it should automatically go to completed.