

DocuSign Reference guide



INVESTED IN YOU.

In the " Admin " tab of your DocuSign account

Under " Regional Settings ", make sure the following options are selected:

Time Zone

Allow users to set their own Time Zone and Date Format

Default Time Zone for the account

(UTC-05:00) Eastern Time (US & Canada) ▼

Default Date/Time format for the account

4/27/2018 | 04:00:00 pm ▼

Under " Security Settings ", make sure the following options are selected:

Recipient Authentication Triggers

- The first time a recipient accesses an envelope per device
- Every time a recipient accesses an envelope

Under " Sending Settings ", make sure the following options are selected:

Recipient Roles

- Enable specify recipients
- Enable allow to edit recipient
- Enable update recipients
- Enable in person (hosted) signing role

Under " Signing Settings ", make sure the following options are selected:

Recipients

- Require a reason when a recipient declines to sign
- Allow recipients to sign on paper
- Allow senders to override sign on paper
- Allow recipients to sign on a mobile device
- Allow recipients to change signing responsibility
- Allow senders to override change signing responsibility
- Allow recipients to edit documents
- Allow recipients to create a DocuSign account
- Allow recipients to sign documents offline on a mobile device ⓘ

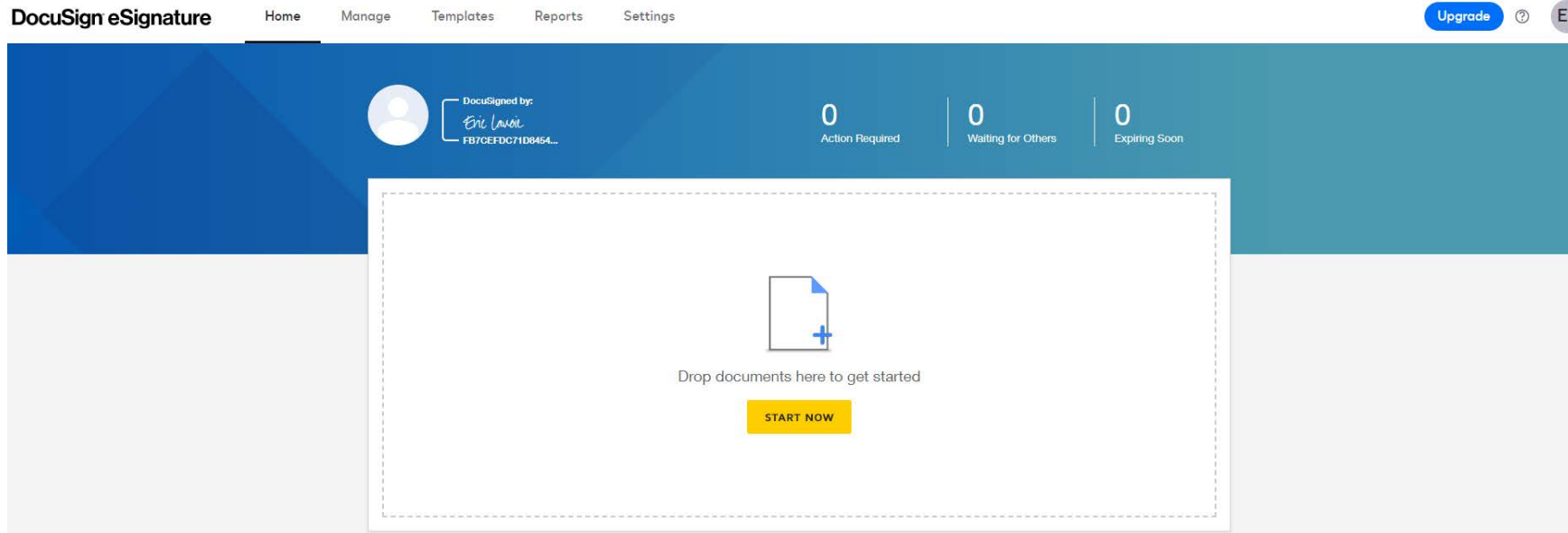
Envelope Delivery

- Attach documents to completion email
- Attach certificate of completion to envelope
- Suppress emails to embedded signers
- Send completion emails to embedded signers
- Allow account users to decide if they should send a link or attach a PDF

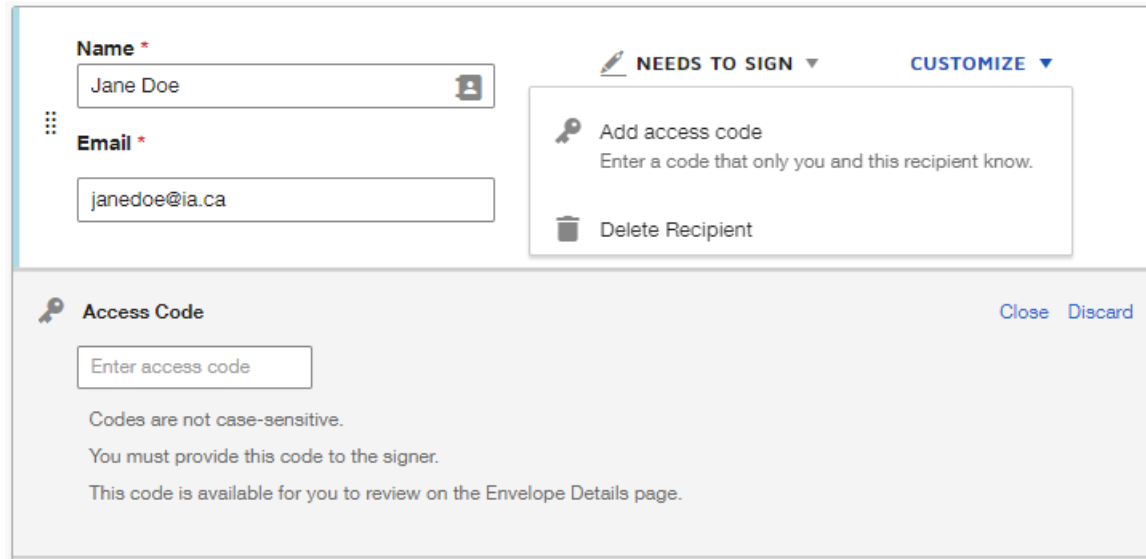
Deliver self-signed email notifications by

Link ▼

DocuSign – Add documents



- Simply click on the " Start now " button to import your prefilled documents which will be used for the signature ceremony.
- You can add as many documents as necessary.
- The documents must not be password protected before being imported.



The screenshot shows the DocuSign 'Add signers' interface. It features a form with the following elements:

- Name ***: A text input field containing 'Jane Doe' and a user icon.
- Email ***: A text input field containing 'janedoe@ia.ca'.
- NEEDS TO SIGN**: A dropdown menu with a pencil icon.
- CUSTOMIZE**: A dropdown menu with a downward arrow.
- Add access code**: A section with a key icon and the text 'Enter a code that only you and this recipient know.'
- Delete Recipient**: A section with a trash can icon.
- Access Code**: A section with a key icon, a text input field labeled 'Enter access code', and the text 'Codes are not case-sensitive. You must provide this code to the signer. This code is available for you to review on the Envelope Details page.'
- Close Discard**: Two buttons in the top right corner of the 'Access Code' section.

- Add every person who must participate to the signature ceremony (including the advisor).
- Every signer must have their own unique email address.
- You must add an " Access code " for every client (it's not necessary to add one for the advisor) by clicking on " Customize ", then " Add access code ". The advisor must choose an access code and communicate it to the clients so they can proceed to the signatures.

DocuSign – Prepare the documents for the signature

The screenshot shows the DocuSign interface for a document titled "SECTION C – AGENT". The document content includes a section for "Agent's Confirmation" and "Proceeds of Crime (Money Laundering) and Terrorist Financing Act and Regulations". There are two main signature fields: "Agent's signature" and "Witness (if required)". The "Agent's signature" field has a dropdown menu for "Jane Doe" and a "Correcting" button. The "Witness (if required)" field has a dropdown menu for "Last and first name (Print legibly.)" and a "Signature" field with an "X" mark. The document is titled "F1EA Signature Form.pdf" and is page 3 of 11.

At this stage, you must configure the various fields related to the signing ceremony.

For example, the tool is not able to recognize where each person should sign or initial.

It is therefore necessary to do this for each of the documents previously added.

- To select a signer, choose them in the drop-down menu at the top-left of the page
- To add a signature field, click on " Signature "
- To add an initial field, click on " Initial "
- To add a " signed at " field, click on " Text "

**It is not necessary to add a field for the signature date because the signature tool automatically save this information.*

DocuSign – Review and send the documents

Review and Send

Message to Recipients

Email Subject*

Please DocuSign: F1EA Signature Form.pdf

Characters remaining: 59

Email Message

Enter Message

Characters remaining: 10000

Send automatic reminders

[Add Private Messages](#)

PREVIEW BACK SEND

UPGRADE

ADD SELECT PREPARE REVIEW

SUMMARY OPTIONS

Documents Edit

F1EA Signature Form.pdf

Recipients Edit

EL Eric Lavoie Needs to Sign

JD Jane Doe Needs to Sign

janedoe@ia.ca

Once the envelope is completed, all recipients will receive a copy of the completed envelope.

SUMMARY OPTIONS

Expiration

Envelope expires on: 03/12/2021 120 days from now

Recipient Privileges

Allow recipients to change signing responsibility

Comments

Enable comments

- Before sending the email, you can change the email subject field and write a message.
- Make sure the " Allow recipients to change signing responsibility " box is unchecked under the " Options " tab.
- Once you are done reviewing, click on " Send " to send the documents to the signers.

DocuSign – Sign the documents

Please review the documents below. FINISH OTHER ACTIONS ▾

START

DocuSign Envelope ID: 8F61E689-DD00-49E6-B3EC-5BF1BF0AF730

iA Financial Group

Contract no.

SIGNATURE FORM
Electronic request no.
VOID
For internal use only

F1EA Signature Form
For an Electronic Application for **Individual Life or Critical Illness Insurance** (New Application or Change)

APPLICANTS (OR AUTHORIZED SIGNATORIES FOR ORGANIZATIONS) Write legibly in black letters.

Last name

First name

Date of birth Y Y Y Y M M D D

Adopt Your Signature

Confirm your name, initials, and signature.
* Required

Full Name*

SELECT STYLE DRAW

PREVIEW

DocuSigned by:
Eric Lavoie
FB7CEFDC71D8454...

By selecting Adopt and Sign, I agree that the signature and initials will be the elect (my agent) use them on documents, including legally binding contracts - just the s

ADOPT AND SIGN CANCEL

DocuSigned by:
Eric Lavoie
FB7CEFDC71D8454...

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Eric Lavoie
FB7CEFDC71D8454...

Please read the "Handwritten signature" appendix to know how to proceed if your document require a handwritten signature (ex.: Change of beneficiary, medical authorizations).

- Once the signer clicks on the link in the invitation email they must enter the access code you gave to them.
- The signer has to select their electronic signature among a list of suggested styles and then click on every field you previously configured to complete them.
- The advisor has to go through the same process as the client to complete their part of the signature ceremony.

**The client doesn't have to be subscribed to DocuSign to be able to sign the documents.*

DocuSign – Retrieve the completed documents

The screenshot shows the DocuSign eSignature interface. At the top, there are navigation tabs: Home, Manage, Templates, Reports, and Settings. The 'Manage' tab is active. The main content area displays a document titled 'Please DocuSign: Formulaire de signatures.pdf'. Below the title, it shows the envelope ID, last change time, and sent time. A green checkmark indicates the document is 'Completed'. There are 'MOVE' and 'MORE' buttons. Below this, there are two recipients, both marked as 'Signed' with their respective signature dates and times. A 'SIGNING ORDER' button is visible. On the right, there is a preview of the document. A red circle highlights a download icon (a downward arrow) in the top right corner of the document preview area. A red arrow points from this icon to a 'DOWNLOAD' dialog box that is open in the foreground. The dialog box has a title bar with a close button (X). Inside, it says 'Select which files you want to download:'. There are four options, each with a checkbox: 'All 2 files' (checked), 'Document 1 PDF' (checked), 'Certificate of Completion 1 PDF' (checked), and 'Combine all PDFs into one file' (unchecked). At the bottom of the dialog, there are two buttons: 'DOWNLOAD' and 'CANCEL'.

➤ To retrieve the completed documents, go under the "Manage" tab of your account to see the list of all your transactions.

➤ Click on the transaction you want to retrieve and you will be redirected to that page. Click on the arrow button to download the documents.

➤ Select all the documents, including the "Certificate of Completion" (this is in this document that the signature dates are automatically saved, along with other necessary information to make your transaction compliant) then click on "Download".

**The "Combine all PDFs into one file" option didn't seem to work properly during our tests.*

APPENDIX 1 – Handwritten signature

Adopt Your Signature ×



Confirm your name, initials, and signature.

* Required

Full Name* Initials*

[SELECT STYLE](#) **DRAW**

PREVIEW Change Style

DocuSigned by:  DS 
FB7CEFDC71D8454...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

Adopt Your Signature ×

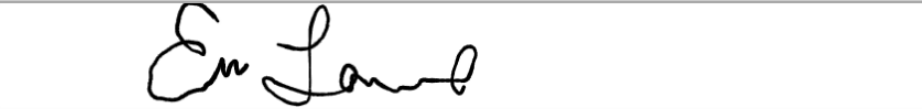
Confirm your name, initials, and signature.

* Required

Full Name* Initials*

[SELECT STYLE](#) **DRAW**

DRAW YOUR SIGNATURE Clear



By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

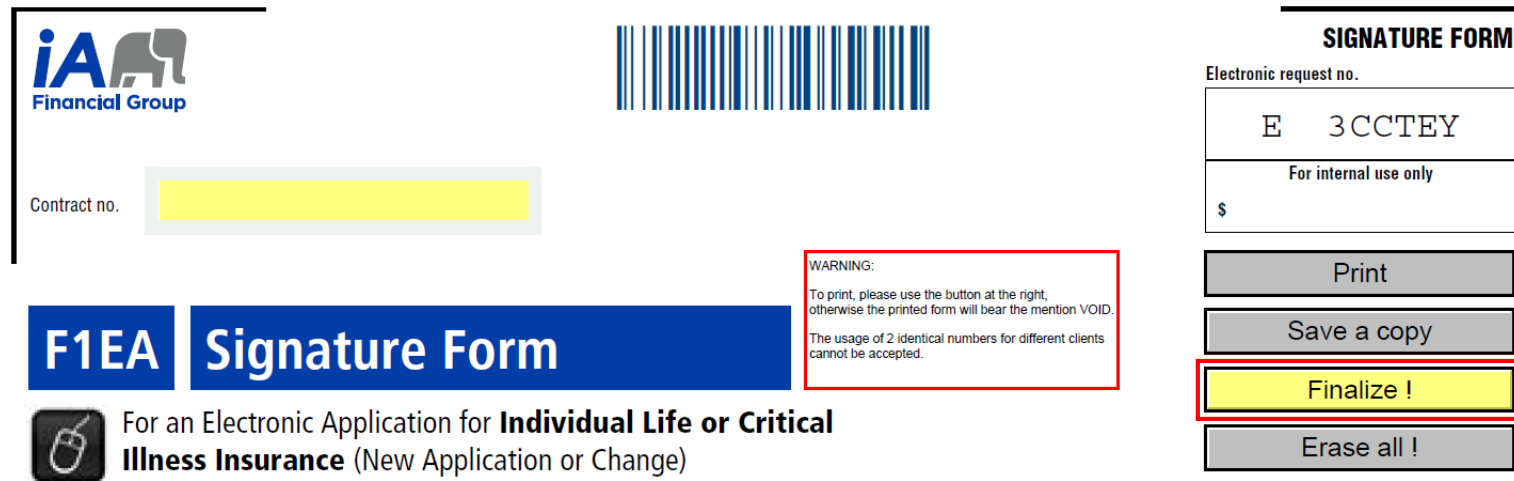
It is impossible to make it mandatory for your client to use a handwritten signature with DocuSign, this is the reason why it is important for the advisor to explain how to proceed.

- After clicking on the link in the invitation email, when the tool ask them to choose their signature, they must click on the " Draw " tab.
- The client has to draw their signature in the white rectangle, then click on " Adopt and sign ".
- They will be able to use their handwritten signature to complete the signature fields in the documents.

APPENDIX 2 – Fill and save the electronic Signature Form (F1EA)

When you use the electronic Signature Form (F1EA), it's important to save it properly, making modifications no longer possible.

To do so, open it with Adobe Acrobat Reader, fill the form, then click on the « **Finalize !** » button. A new window will open, allowing you to save your form. It's this saved form that you must import to the signature tool.



The screenshot shows the F1EA Signature Form interface. On the left, there is the iA Financial Group logo and a 'Contract no.' field with a yellow highlight. In the center, there is a barcode. Below the barcode, a red-bordered box contains a warning: 'WARNING: To print, please use the button at the right, otherwise the printed form will bear the mention VOID. The usage of 2 identical numbers for different clients cannot be accepted.' On the right, there is a 'SIGNATURE FORM' section with a table for 'Electronic request no.' containing 'E 3 CCTEY', a 'For internal use only' field with a '\$' symbol, and four buttons: 'Print', 'Save a copy', 'Finalize !' (highlighted in yellow and red), and 'Erase all !'.

If you do not see this button, please download the latest version of the F1EA form in the Document Centre of your **Advisor Centre**.