

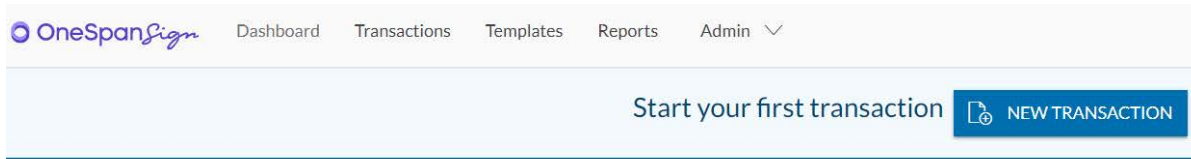
OneSpan

Reference guide



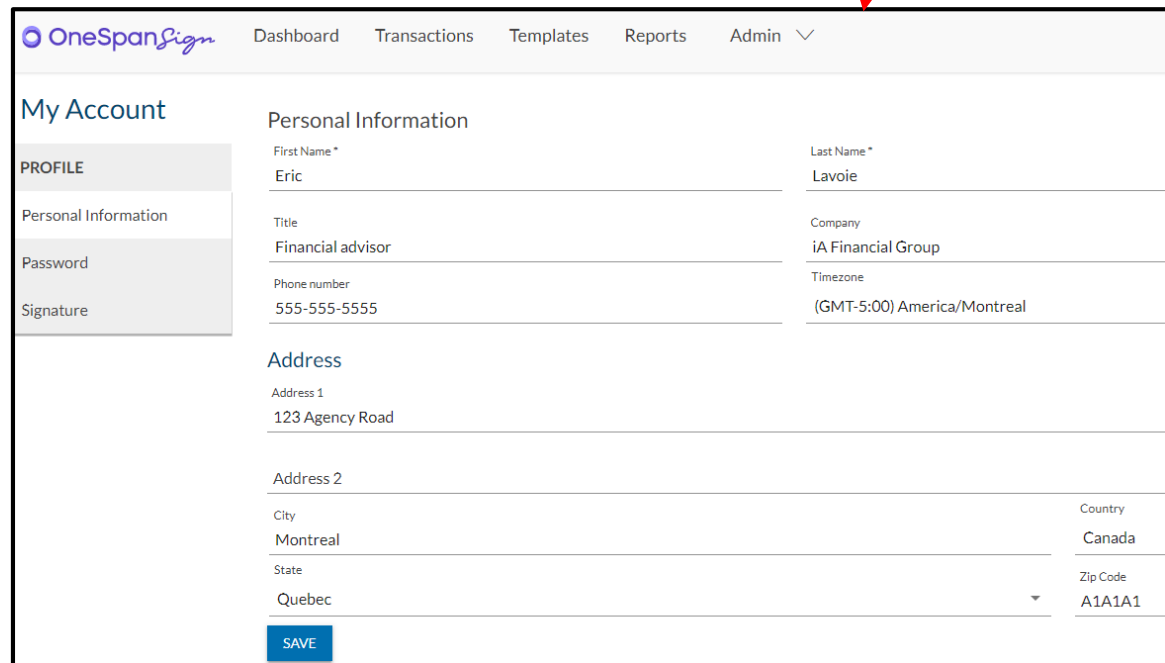
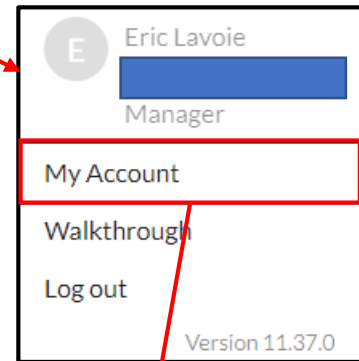
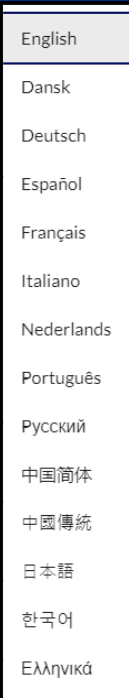
INVESTED IN YOU.

OneSpan – Account settings



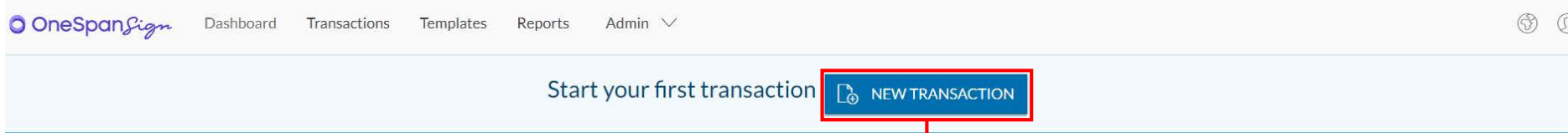
Dashboard
Account Summary Last 30 days My Transactions Last 30 days

- You can change the language by first clicking on the **planet Earth** symbol, then by selecting the desired language in the list.
- Change your OneSpan account by first clicking on the **character symbol**, then by clicking on **My Account**. You will be able to change:
 - Your **Personal Information**
 - Your **Password**
 - Your electronic **Signature**



**The time zone for the provinces of Quebec (excluding the Eastern part and the Côte-Nord) and Ontario (excluding the Western part) is GMT-05:00.*

OneSpan – Create a new transaction



Dashboard
Account Summary

Create New Transaction

Last 30 days

Name *
Please enter a transaction name

Description

Message to all recipients (optional)

Use Template
Select a template

SETTINGS

Language English	Timezone (GMT-5:00) America/Montreal
Enable in person signing <input type="checkbox"/>	Review before completion <input type="checkbox"/>
Enable screen-reader accessibility <input type="checkbox"/>	

Expiration
Type: Date | Expiry Date:

Uploads
Maximum number of files per attachment: Unlimited | Max number of files:

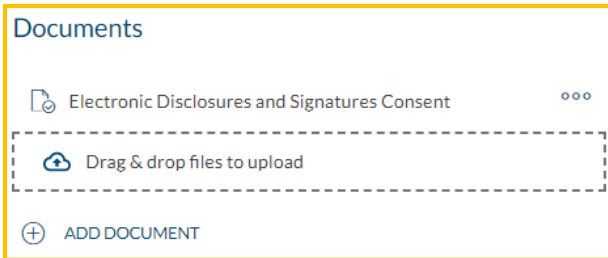
Field Formatting
Font Size: 12px (Default)

CANCEL CREATE

- Simply click on the " **New transaction** " button to open the transaction creation window.
- Certain information can be changed at this point but the most important are :
 - Transaction name
 - Communication language
 - Time zone (if the right time zone is already selected to your account, it should be automatically selected)
- Once you're done click on " **Create** ".

OneSpan – Add the documents and the signers

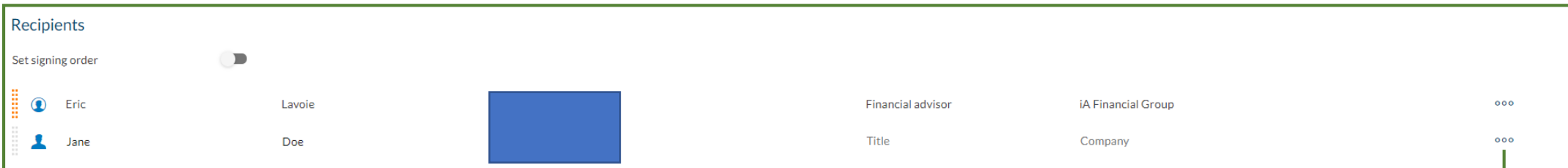
< transaction 1 Draft



➤ Click on " **Add document** " to import your prefilled documents which will be used for the signing ceremony.

➤ The documents must not be password protected before being imported.

**The " Electronic Disclosures and Signatures Consent " document is added by default.*



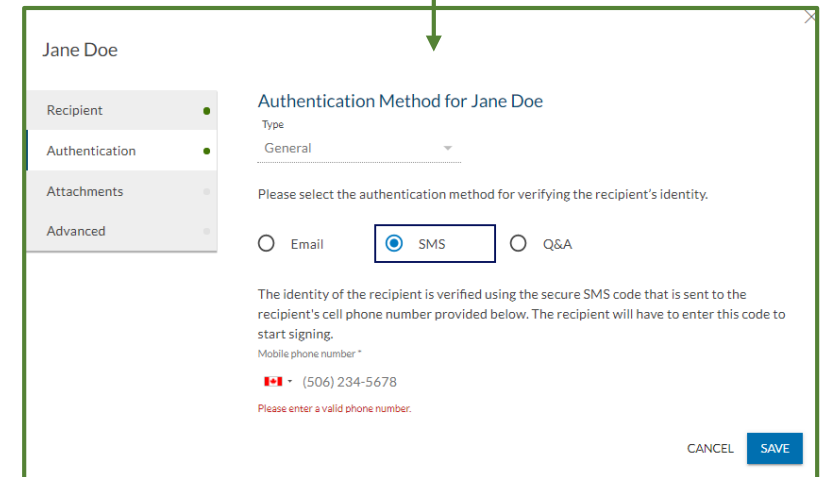
⊕ ADD RECIPIENT

➤ Add every person who must participate to the signature ceremony (including the advisor).

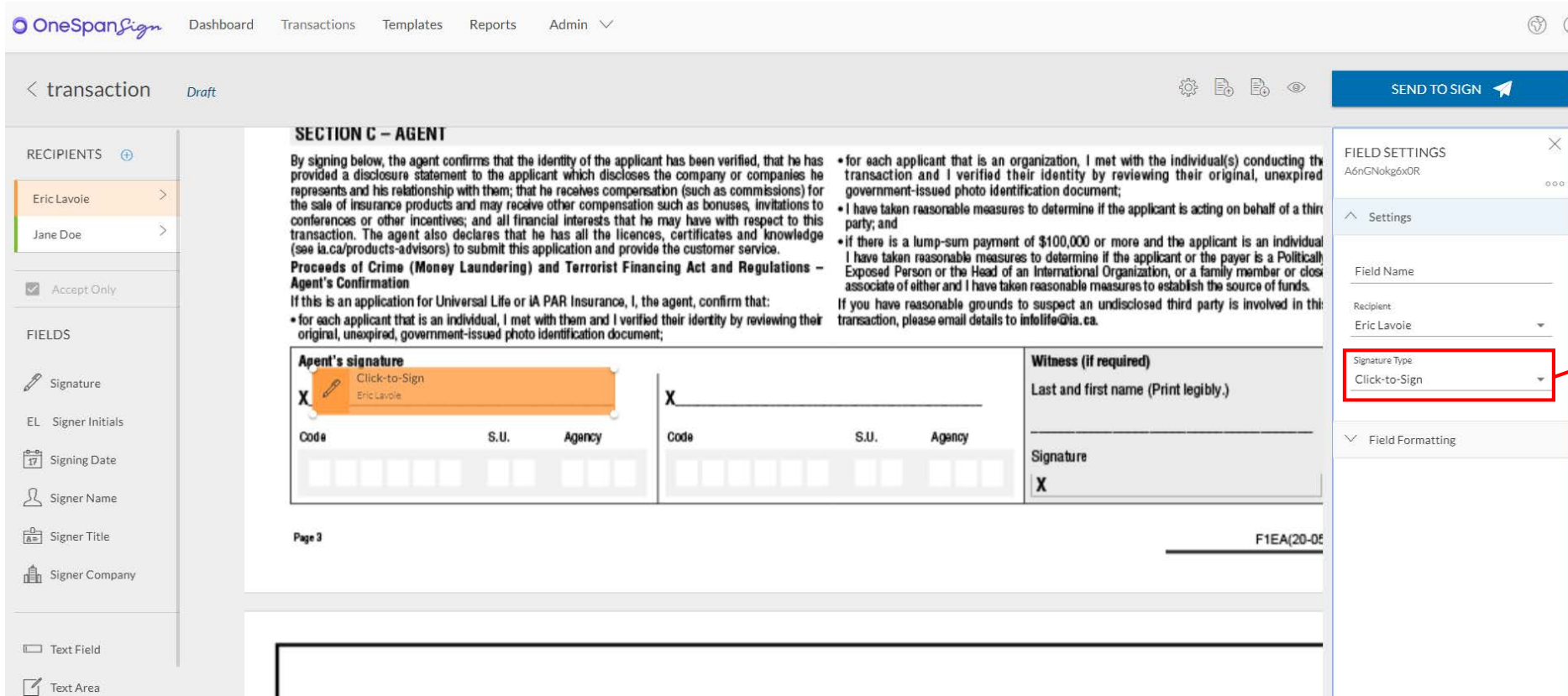
➤ Every signer must have their own unique email address.

➤ You must add an authentication method for every client (it's not necessary to add one for the advisor) by clicking the 3 dots " ... ", then " **Settings** " and " **Authentication** ".

➤ The options **SMS** and Question&Answer (**Q&A**) are accepted, but not **Email**.



OneSpan – Prepare the documents



The screenshot shows the OneSpanSign interface for a document draft. The document content includes a section titled "SECTION C – AGENT" with legal text and a signature field. The signature field is configured for "Eric Lavoie" and is set to "Click-to-Sign". A red box highlights the "Signature Type" dropdown in the "FIELD SETTINGS" panel, which is set to "Click-to-Sign".

You can choose which type of signature you want for each signature field:

- **Click-to-Sign:** The signer doesn't have to "draw" their signature, they only have to click on the field to sign. This signature type is accepted for almost every document.
- **Capture signature :** The signer has to draw their signature. You must select this type of signature when a handwritten signature is required. (ex.: Change of beneficiary, medical authorizations).

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

- To select a signer, choose them at the top-left of the page
 - To add a signature field, click on " **Signature** "
 - To add an initial field, click on " **Signer Initials** "
 - To add a " signed at " field, click on " **Text Field** "

OneSpan – Sign the documents

The image shows a digital signature form with three main sections:

- Date:** A field with a yellow background and a dotted pattern, followed by a date input field with labels Y, Y, M, M, D, D.
- Policyowner's signature:** A field with a yellow background and a dotted pattern, followed by a yellow button labeled "Click to Sign" with a signature icon.
- Policyowner's signature, if applicable:** A field with a grey background and a dotted pattern, followed by a grey button labeled "X" with a signature icon.

- Once the signer clicks on the link in the invitation email they must complete the Authentication process (SMS or Q&A)
- They must accept the " *Electronic Disclosures and Signatures Consent* ".
- The signer has to 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 OneSpan to be able to sign the documents.*

OneSpan – Retrieve the completed documents

➤ To retrieve the completed documents, go to the "Dashboard" tab of your account and click on "Completed".

➤ Click on the transaction you want to retrieve and you will be redirected to a new page.

➤ To download all the required documents, you must click on two different buttons:

1. To download the completed documents
2. To download the evidence summary (this is the document in which signature dates are automatically saved, along with other necessary information to make your transaction compliant)

Transaction Status	Count
REQUIRES MY SIGNATURE	0
COMPLETED	1
EXPIRING SOON	0
IN PROGRESS	0

transaction Completed

Documents

1	Electronic Disclosures and Signatures C...	✓	👁
2	F1EA Signature Form	✓	👁

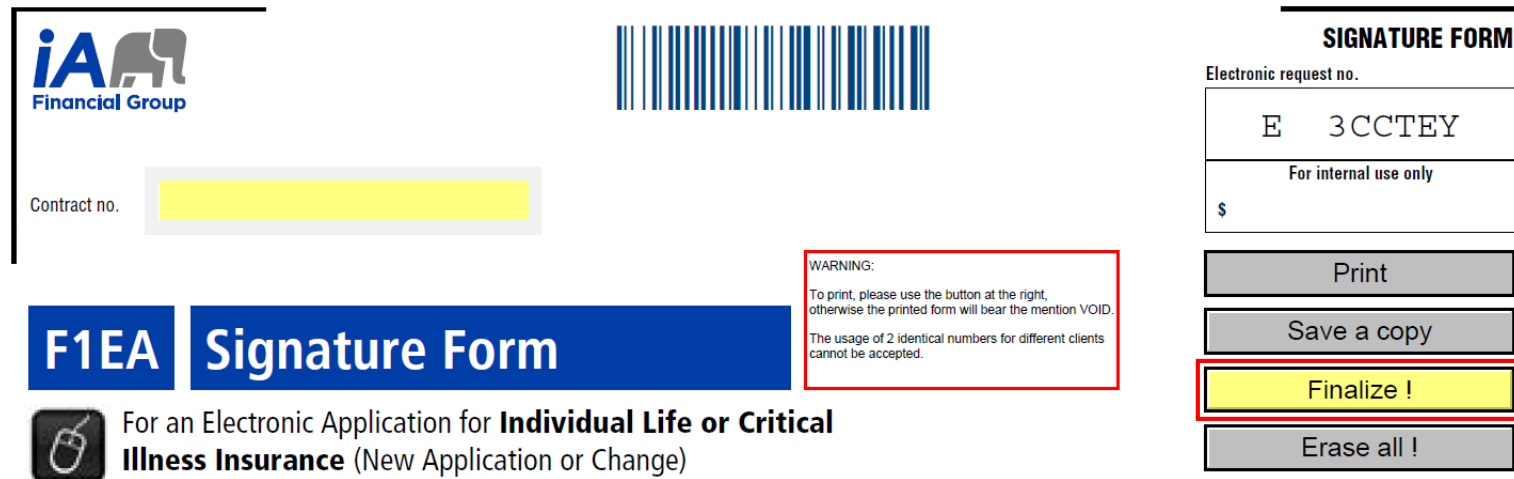
Download Summary Archive Trash

1 2

APPENDIX – 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 number field. In the center, there is a barcode and a warning box. On the right, there is a 'SIGNATURE FORM' section with fields for 'Electronic request no.' and 'For internal use only', and buttons for 'Print', 'Save a copy', 'Finalize !', and 'Erase all !'. The 'Finalize !' button is highlighted with a red border.

iA Financial Group

Contract no.

F1EA **Signature Form**

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

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.

SIGNATURE FORM

Electronic request no.
E 3 CCTEY

For internal use only
\$

Print

Save a copy

Finalize !

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**.