DocuSign eSignature FAQs

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1. **As the writing Rep, will I sign into DocuSign? Should I create a DocuSign account?**

    A. No. The writing Rep will not sign into DocuSign and should not create a DocuSign account. All of the writing Rep's actions will take place within the TurboApps screens.

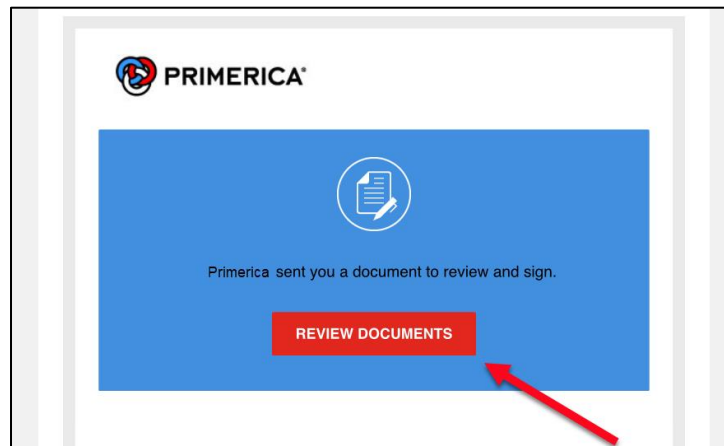2. **Which email address and phone number should I enter for the signers?**

    A. You must enter the signer's email address and the signer's phone number. This contact information will be part of the application's official record and will also be used in the DocuSign signature process. The signer will need to access this email address and phone number to review and sign the application document(s).

    Do not enter your own, or another individual's, email address or phone number for a signer. The selected email address and phone number will be documented as part of the application's official record, and will be tied to the signer in Primerica's records. Entering the signer's own email address and phone number is vital to ensuring that required legal disclosures will be delivered to the required individual and that the signature will be completed by the required individual.
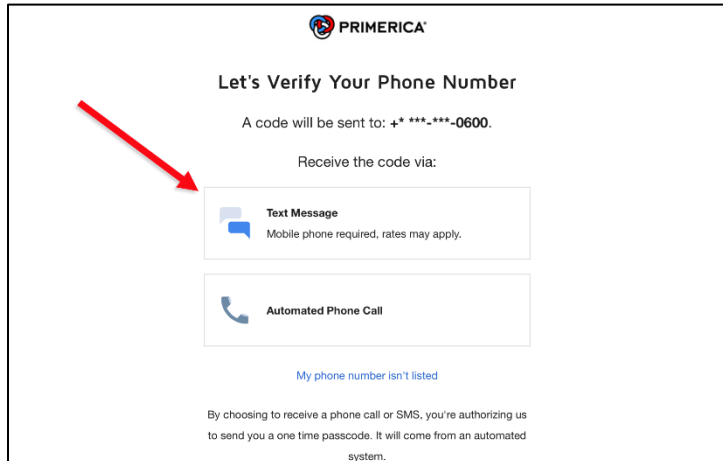
    Entering this information accurately helps protect the integrity of Primerica's applications and contracts.

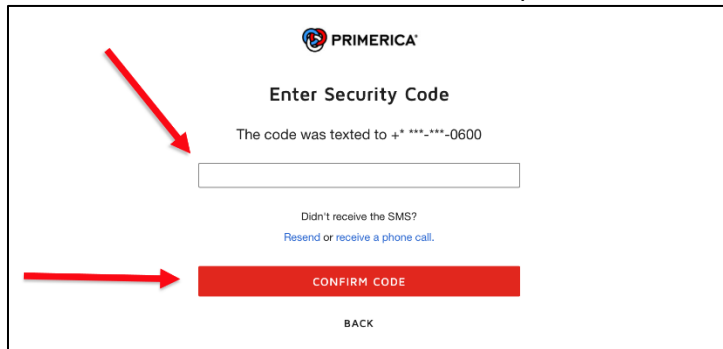3. **How does the signer access the envelope to sign?**

    A. In the email the signer receives from DocuSign, they will click **Review Documents**.

B. Click on **Text Message or Automated Phone Call.**

C. Enter code that was received on their phone and click on **Confirm Code.**

4. **Does a third-party payer on the IBA require a Security Code to sign?**
   A. No**.** Third-party payers on an IBA will only need to provide an email to sign the application - no Security Code is needed. On the Life Application, however, all signers will need to supply an email and phone number.

5. **Why is the signer not receiving emails from DocuSign?**
   A. Have the signer check their email's Junk or Spam folder. If the DocuSign email is in these folders, mark the email as not-junk or not-spam.

6. **How does the signer sign a document with DocuSign?**
   A. When in the DocuSign Signing Experience, they will read and review the documents. When they are ready to sign, they will click on **Sign** and then adopt their signature by either drawing, picking a font or uploading an image. After they select their signature, they will click on **Adopt and Sign**. Once they have signed in each place, they will click on **Finish**. [https://support.docusign.com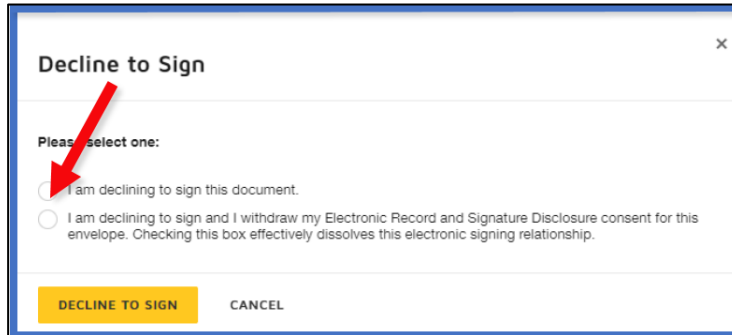/en/articles/How-do-I-sign-a-DocuSign-document-Basic-Signing](https://support.docusign.com/en/articles/How-do-I-sign-a-DocuSign-document-Basic-Signing)

7. **What If the signer does not want to sign electronically?**
   A. The electronic signature is a required step of the electronic application. The signer would need to switch to a paper application to avoid electronic signatures. If the signer no longer wishes to sign the document(s), they may choose the Decline to Sign option. Declining to sign will void the application in progress.

8. **How does the signer decline to sign and/or withdraw their consent to sign electronically?**
   A. When in the DocuSign Signing Experience, click **Other Options** (or the **menu** icon on a mobile device) and select **Decline to Sign**. When prompted click **Continue**. Check the "I am declining to sign and I withdr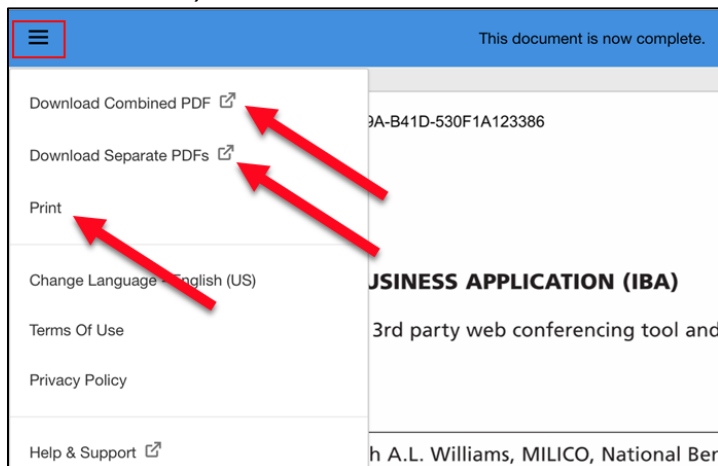aw my Electronic Record…" button. Click **Decline to Sign**. https://support.docusign.com/en/guides/Declining-to-sign-DocuSign-Signer-Guide

9. **What happens if the signer does not click the "Finish" button after signing?**
   A. If they close the browser instead of hitting the Finish button, their envelope is not considered signed and will show **In Process** on the application. They will need to go back into the document thru the DocuSign email, sign the documents again, and click on **Finish**.

10. **How does the signer download or print their completed/signed document?**
    A. In the completed email that they receive from DocuSign, click on **View Completed Documents.** Click **Other Options** (or the **menu** icon on a mobile device) and select **Download…PDFs** or **Print**.

11. **What is the difference between Combined and Separated when using the download option?**
    A. **Separate PDF** - This will download the documents as Primerica uploaded them, with the application document(s) separate from the payment document(s). (For example, an envelope sent with two different documents will bedownloaded as a ZIP file containing the two documents)
    B. **Combined PDF** - This will combine all documents into a single PDF

12. **What does the signer do if they lock themselves out of the envelope due to too many incorrect login attempts?**
    A. The signer will need to contact their Primerica Rep and have them resend the envelope. This will unlock the envelope and the signer will receive a new email that they can use to access and authenticate to the envelope.

13. **What should I do if the app does not get updated with the "completed" status, but the signer says they have signed in DocuSign?**
    A. Confirm with the signer that they hit "finished" after signing. If so, resend the DocuSign link(s) so that they can try again.

14. **What should I do if the signer sees an error on their application while reviewing the document?**
    A. If there is an error of typo that needs to be corrected, unlock the application and correct the info. Re-enter payment information and resend the DocuSign Link(s) for signature.
    B. If the signer no longer wishes to sign due to the application language, or simply changes their mind on applying, they may choose the Decline to Sign option.   Declining to sign will void the application in progress.

Glossary:

- **Envelope:** an envelope is a container for documents that you send to a recipient to sign
- **Recipient Authentication:** Method that the recipient/signer needs to do prior to accessing the envelope (Example: SMS Text Message)
- **Electronic Record and Signature Disclosure:** Method to obtain consent to receive notices and disclosures electronically
- **Certificate of Completion:** Provides identifying information about the envelope and complete details of the envelope events
- **Sender:** User/Email address that is sending out envelope through DocuSign
- **Recipient/Signer:** Person that will be reviewing/signing