

<b>Subject:</b> <b>Sending OneSpan Documents</b>	<b>Product:</b> <b>Customer Loyalty Group</b>	<b>Approved on:</b> <b>Jamar Lewis</b>
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**Purpose:**

Sending a OneSpan (e-sign) document to a client.

**Policy:**

The client has requested you to update or change information that requires signed documentation to complete.

**Procedure:**

1. Make sure the document is saved to your computer
2. Open OneSpan tab in your browser
  - a. If you are not already signed into OneSpan, it will require you to input your credentials.
3. Select the *New Transaction* icon at the top right of the page
4. If you are using a template, select a template under use template
5. Name your transaction (it is required)
6. Select whether it is an in-person signing or e signing (select e-signing)
7. Click Create
8. Click + to add document under documents
  - a. This will open your computer's saved files. Select the document that you want to send the client
9. It will default to include an electronic disclosures and signatures consent document and your document
  - a. Enter in the *Name* field, fill in client's name
  - b. Enter In the *Email* field, provide client's preferred email address
  - c. If a co-client is present on the account, select *Add Recipient* and follow the two previous steps for the co-client
10. Click the *Next* button
11. Click and drag *Signature Tags* to the appropriate lines
  - a. Tags:
    - i. Signature
    - ii. Initial
    - iii. Date Signed

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In the printed form this is an uncontrolled document. The official version can be found online.

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- Customize the size of the signature, initial and date signed to fit in the appropriate lines. Note example below

The screenshot displays the OneSpan e-signature interface. On the left, a sidebar lists 'RECIPIENTS' (Keven Fox, Fox) and 'FIELDS' (Accept Only, Signature, KF Signer Initials, Signing Date, Signer Name, Signer Title, Signer Company, Text Field). The main area shows a document with placeholder text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.' Below the text are three green boxes: 'Initials' (Click-to-Initial), 'Signature' (Click-to-Sign), and 'Signing Date' (Click-to-Sign). At the bottom, there are labels for 'Printed Name' and 'Date'.

12. Select send to sign
13. Select Send
14. After selecting send the end user will receive an email
  - a. Select Go to document
  - b. Have your client sign the documents (OneSpan Sign Consent and Disclosures)
    - i. The client needs to click the box in front of **"I have read and agree to the terms of the eSign Disclosure Document"**
    - ii. The client will Click accept
    - iii. Click the initial and sign boxes to sign the document
    - iv. Select confirm
15. You can review and download the document by select the desired option
16. Exit that screen and return to OneSpan dashboard
17. Your transaction will show under recent transactions, and you can click the transaction to review the document
18. You can download the document and review it

**Exceptions:**

Remind the client if client do not see the email notification, please advise to check junk or spam folder.

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