



# Getting Started with DocuSign

A photograph of a desk setup against a white wall. In the center is a black laptop with its screen open, displaying a white rectangular box with the text "Click To Begin" in blue. To the left of the laptop is a black mesh pen holder containing several pens and pencils, and an orange stapler. To the right of the laptop is a small green cactus in a red pot, and a stack of three black books or notebooks.

[Click To Begin](#)

## Introduction

BlueShield of California (BSC) instance of DocuSign has a set of customized applications for BlueShield of California (BSC).

Brokers/Agents/Sales Representatives are to use only those applications they are endorsed or appointed to sell.

- MAPD and PDP applications require Brokers to be licensed and certified.
- If a Broker/Agent/Sales Representative sells a product for which they are not certified to sell, they will not receive credit and/or a commission for the sale.

### IMPORTANT:

External Brokers need to add their NPN and/or Tax ID to all applications.

## Terms

### Envelope:

- This is a transaction generated within the application.
- **Note:** envelopes are limited. Please **do not** cancel unless actually necessary. When an envelope (application) is canceled after being sent and a new envelope (application) is sent multiple envelopes are consumed.

### Template:

- A blank, fillable application within DocuSign.
- Each application type has a template created for use.
  - Note: Several applications have additional templates for use when there are multiple applicants

### Recipient / Prospect:

- Depending on the screen one of these two terms will be used to refer to the individual(s) completing the application for specific coverage.

### Buttons:

- A **radial button** is circular selection point on the application. Only one option is allowed when a radial button is used.
- A **checkbox** is a selection box used in various places on the application. Checkboxes will allow multiple selections.

## Signatures

DocuSigned by:

This is the signature either the Salesperson or Prospect create to use.

DocuSigned by:  
*Demo User*  
76123045997E442...

### Requesting Access as an External Broker

External Brokers requesting access to Blue Shield of California’s DocuSign, will need to complete the access request form.

**Note:**

This form is only necessary if the Broker has not already setup in the system.

If you need to confirm that your access has been completed, please email:

[MedicareBroker@Blueshieldca.com](mailto:MedicareBroker@Blueshieldca.com)

**DocuSign – External Broker Access Request**

**Producer Details**

Broker Information

Last Name  First Name  Middle

Tax ID or Social Security Number  NPN

Mailing Address

Street

City  State  Zip Code

Phone Number  Email Address

Optional

FMO Name  FMO Tax ID#

Please email the completed form to [MedicareBroker@blueshieldca.com](mailto:MedicareBroker@blueshieldca.com). Processing takes 3-10 business days.



### Steps

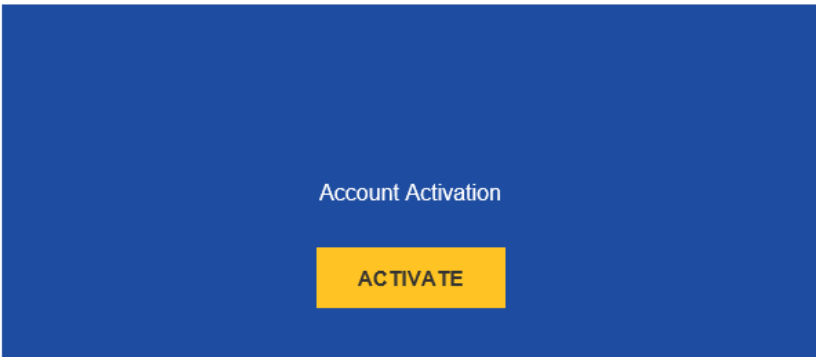
1. External Brokers should request the electronic form be emailed to them from their Broker Sales Manager or contacting Producer Services.
2. Brokers should use a "unique" email address for BSC DocuSign on the request form and not the same email used for other DocuSign services the broker may be using, to avoid system conflicts.
3. Upon receipt, the Broker will need to complete the form, and email back to Blue Shield of California.

Email the completed form to:  
[MedicareBroker@Blueshieldca.com](mailto:MedicareBroker@Blueshieldca.com)

## Activation

Brokers must activate their accounts using the Activation email the system sends to them.

The Activation email can take 3-10 days to receive after submitting the Access Request form.



Please click the 'Activate' button to finish your account activation.

Thank you for choosing DocuSign.

**Do Not Share This Email**

This email contains a secure link to DocuSign. Please do not share this email, link, or access code with others.

**About DocuSign**

Sign documents electronically in just minutes. It's safe, secure, and legally binding. Whether you're in an office, at home, on-the-go – or even across the globe – DocuSign provides a professional trusted solution for Digital Transaction Management™.

**Questions about the Document?**

If you need to modify the document or have questions about the details in the document, please reach out to the sender by emailing them directly.

If you are having trouble signing the document, please visit the [Help with Signing](#) page on our [Support Center](#).

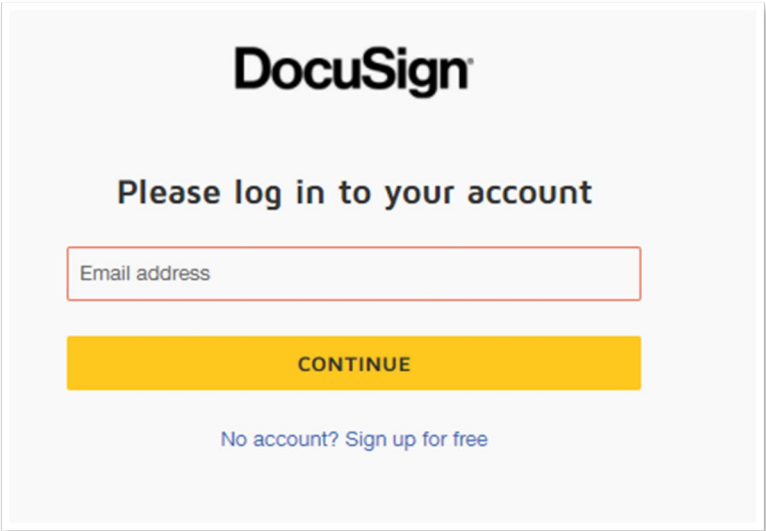
## Accessing the Blue Shield DocuSign Site

1. Open the email and click the link to activate the account.

# Logging In

When accessing the site for the first time you will be asked to enter your [email address](#). Use the same email you provided on your Access Request form.

1



## Steps

1. Enter the full email address and then click <Continue>

**Note:** You will only create your password the 1<sup>st</sup> time you login.

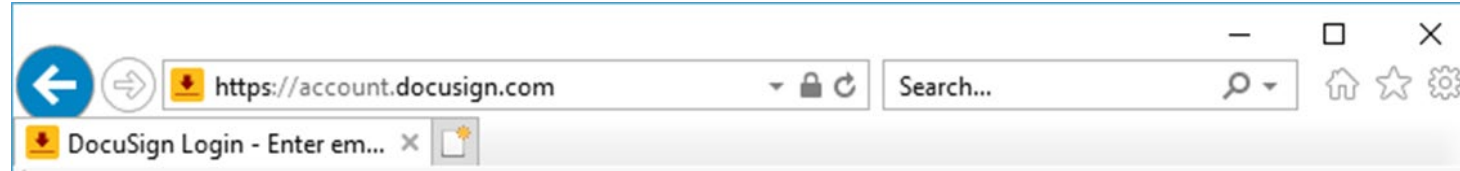
If you forget your password, use the Forgot Password link below the Log In button to request a new password.

## System Requirements

An email address is required for both the Broker and the Recipient

Using email, DocuSign can be used on the following devices:

- Personal Computer (Desktop or Laptop)
- iPad / Tablet
- Smart Phone (IOS or Android)



Blue Shield DocuSign URL:  
<https://account.docusign.com>

**Save the Link – you can only use the Activation email once.**

**For subsequent login – you must use the URL above.**

1. Copy and paste this URL to your "address line."
2. **Create a shortcut on your desktop** using the above as the "location" or save to your browser favorites.

## Accessing the Blue Shield DocuSign Site

Use the internet address to access the Blue Shield of California's DocuSign.

- Copy and paste this to your "address line" for the internet.

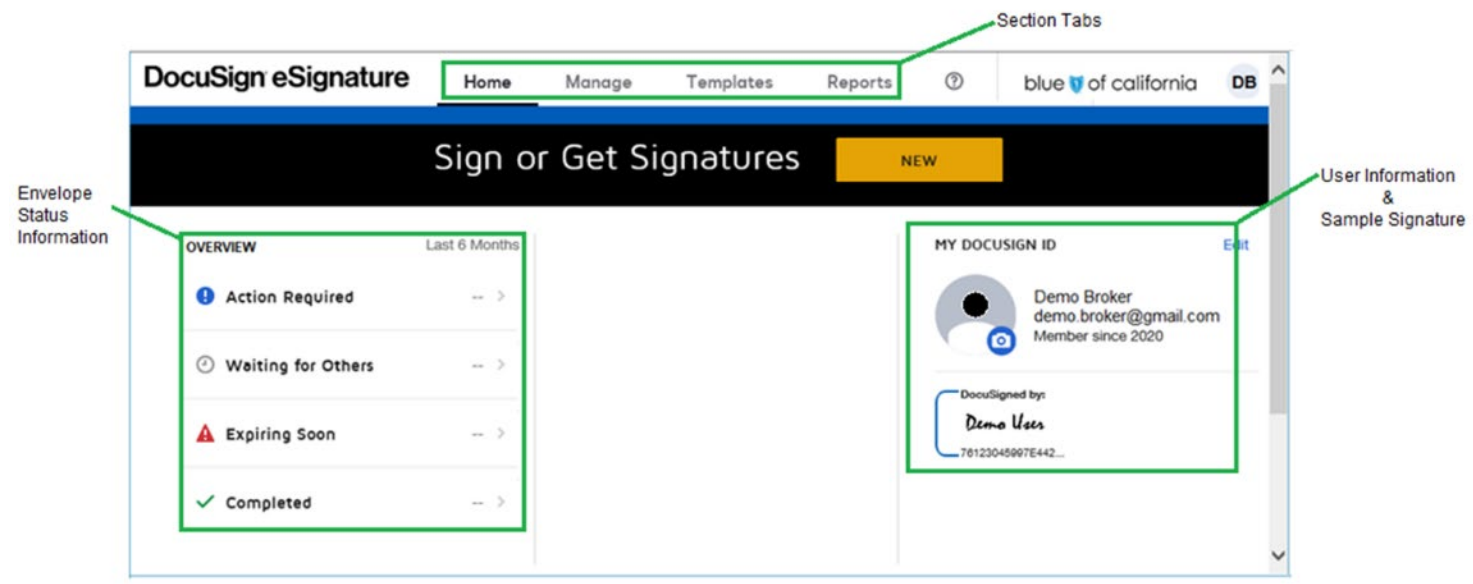
or

Create a shortcut on your desktop using the above as the "location."

# Initial Login

When you log-in, the home page displays.

Some items such as the "My DOCUSIGN ID" won't need to be accessed once the initial entries such as Profile and Signature(s) have been setup.



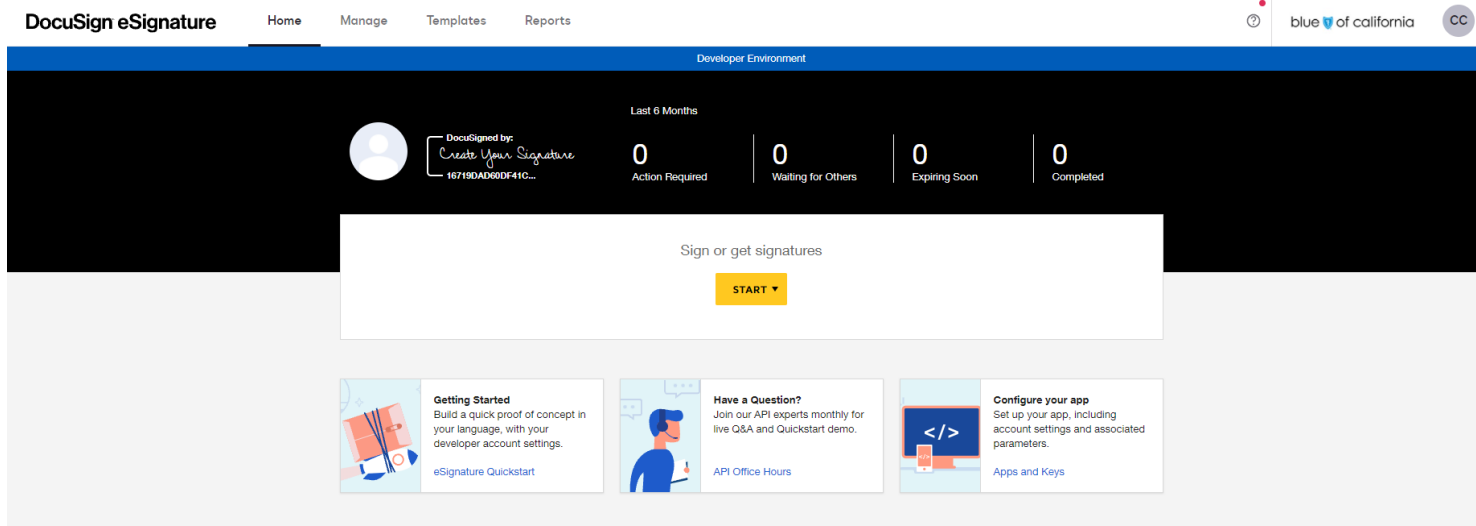
## Note

The Envelope Status information is like a dashboard. It tells you which items you should focus on (i.e. action required and expiring soon).

## Home Page Components

When you log-in, the home page displays.

The Envelope Status information is like a dashboard. It tells you which items you should focus on (i.e. action required and expiring soon).



## Note

Some items such as the "My DOCUSIGN ID" won't need to be accessed once the initial entries such as Profile and Signature(s) have been setup.

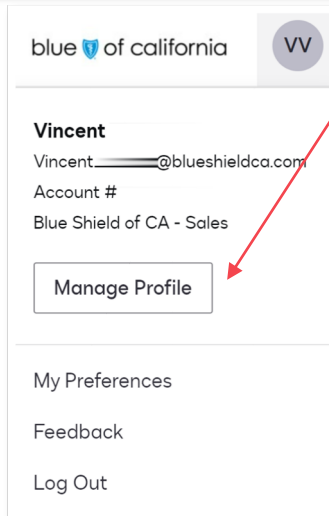
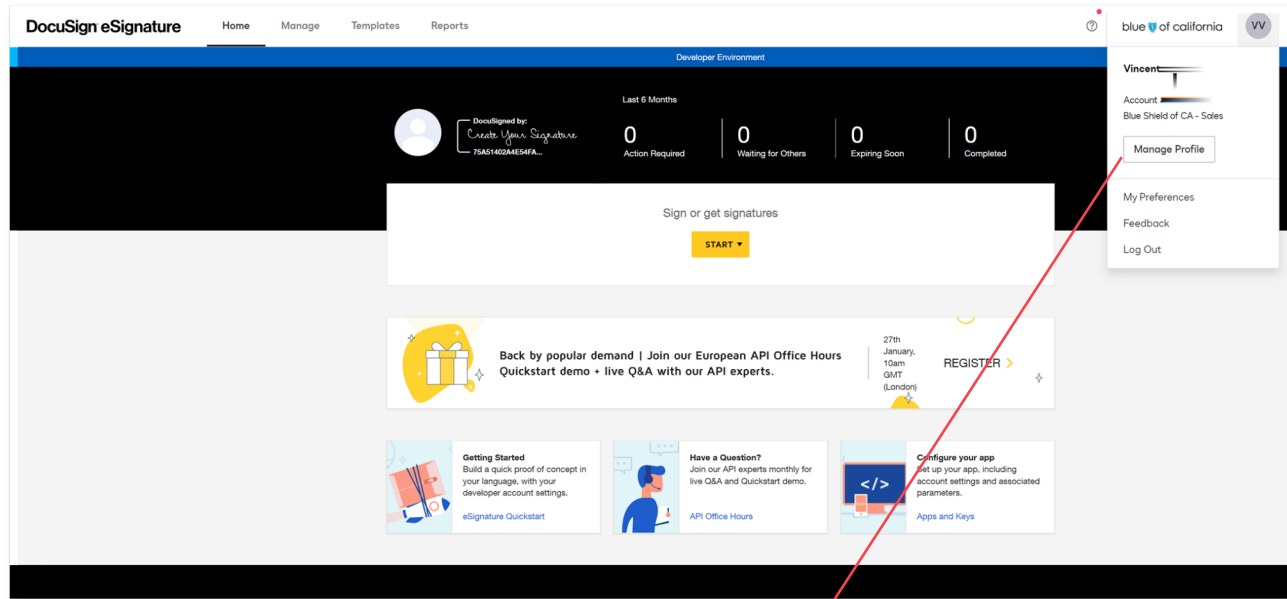


## Quick Signature Change

The first thing the Broker will need to do is complete your user Profile and DocuSign Signature.

To change your signature:

1. Click on the signature image at top-left of the home screen.
2. A new pop-up window opens. Select a signature from the list.



## Manage Your Profile Steps

1. "My Profile Information" can be located by clicking on your initials located on the top right-hand portion on the screen.
2. User information will display.

Select "Manage Profile" to be directed to "My Profile Information".

# Updating Your Profile

This only needs to be completed the first time you use the application or when any of your personal information needs to be updated.

## Steps

The "My Profile Information" screen will display in a new tab window.

As you scroll down the page you will see several sections where you can update information.

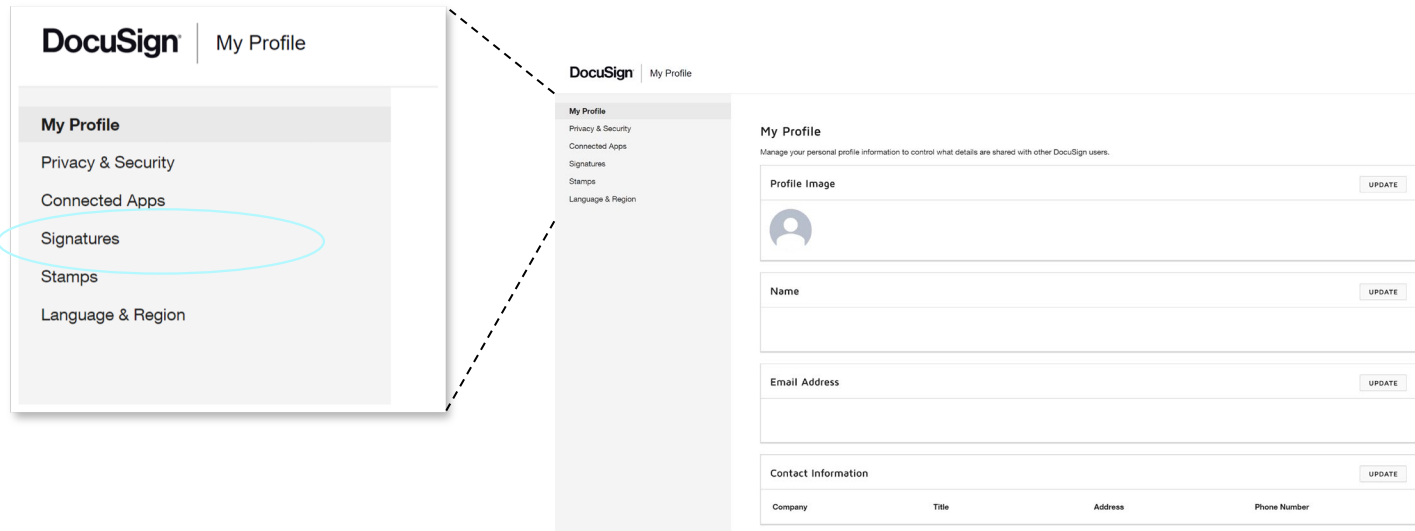
3. Upload your Profile Photo.
4. Click the <Save> button to complete profile update.
5. Next, fill in your Contact Information.

**Note:** If you see Blue Shield Sales in the Company and Job Title fields; please feel free to change it to your company name and job title.

## Creating the Brokers Signature

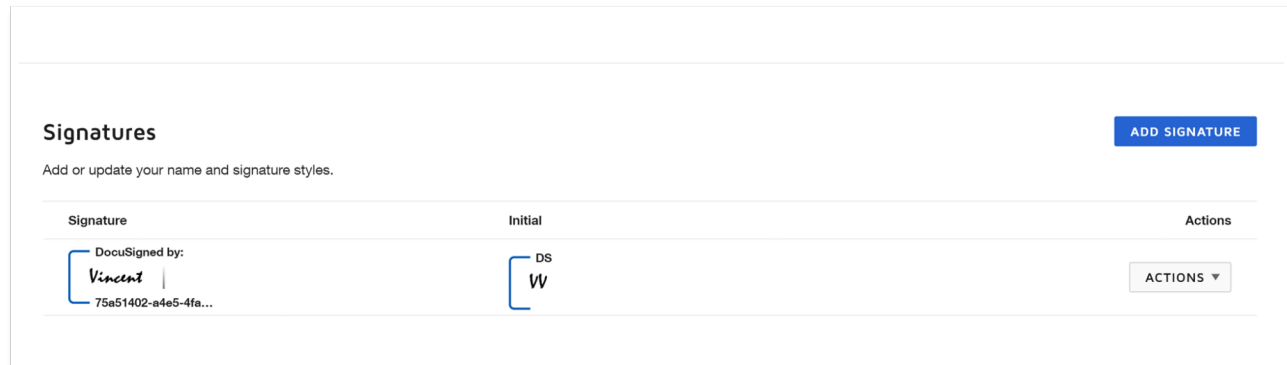
After saving your personal information, click on [Signatures](#) selection located in the left navigation bar.

The manage signatures pane will open to the right.



## Steps

6. Next click on the Add Signature to create your personal signature.



# Creating the Brokers Signature

The manage signatures pane will open to the right.

**Create Your Signature**

7 Full Name  Initials

**CHOOSE** DRAW UPLOAD

8

<input type="radio"/>	DocuSigned by: <i>Demo Broker</i> 78123045997E442...	DS <i>DB</i>
<input type="radio"/>	DocuSigned by: <i>Demo Broker</i> 78123045997E442...	DS <i>DB</i>
<input type="radio"/>	DocuSigned by: <i>Demo Broker</i> 78123045997E442...	DS <i>DB</i>
<input type="radio"/>	DocuSigned by: <i>Demo Broker</i> 78123045997E442...	DS <i>DB</i>
<input type="radio"/>	DocuSigned by: <i>Demo Broker</i> 78123045997E442...	DS <i>DB</i>
<input type="radio"/>	DocuSigned by: <i>Demo Broker</i> 78123045997E442...	DS <i>DB</i>

By clicking Create, I agree that the signature and initials will be the electronic representation of use them on envelopes, including legally binding contracts - just the same as a pen-and-paper

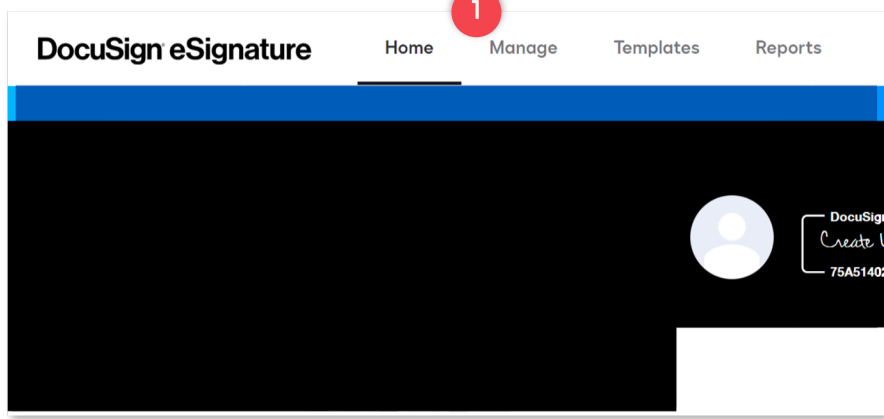
9

## Steps

- If the "Full Name" is not correct, click into the box and type in the desired name.  
  
If the "Initials" need to be modified, click in the box and type in the correct initials.
- Click on the radial next to the set of name and initials sample you wish to use.
- Last, click on <CREATE>. This will create the Signature and Initials to be used on documents and return you to the Signature screen.
- Once all updates are completed, close the tab to return to the main window.

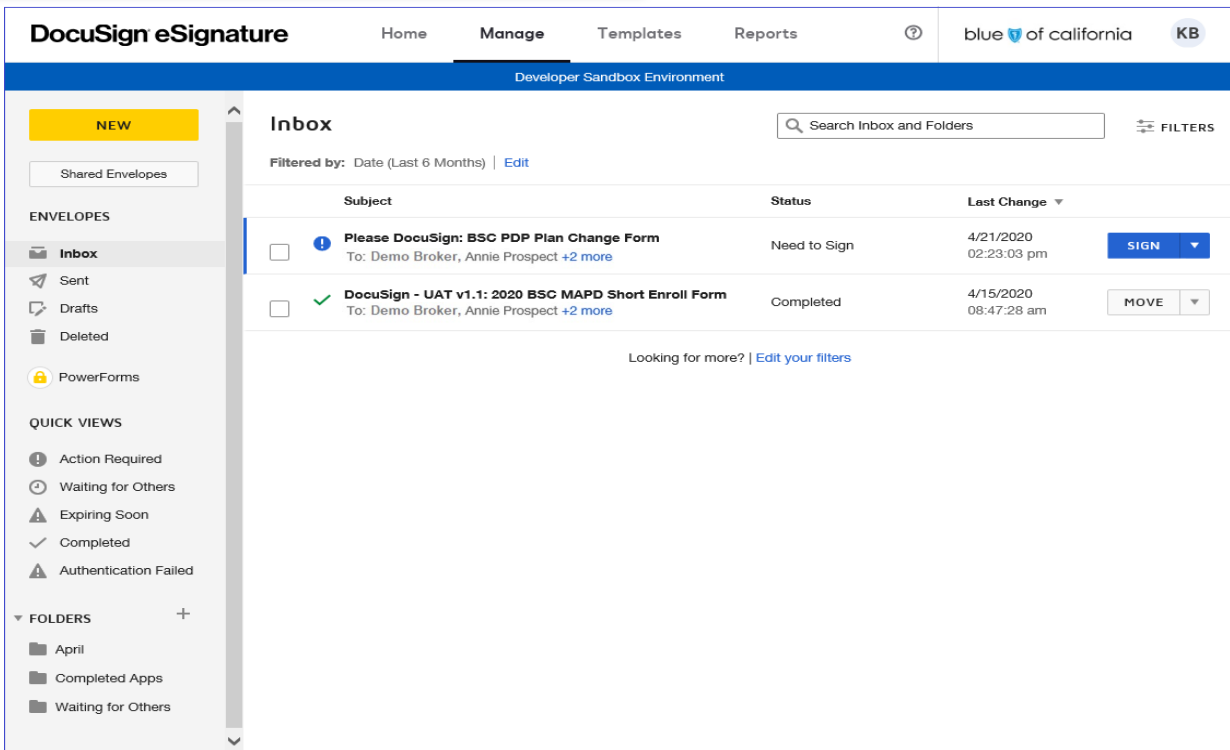
# Manage Screen

The Manage screen is used to manage your email.



## Steps

1. To access this screen, click on the "Manage" tab located at the top of your screen.



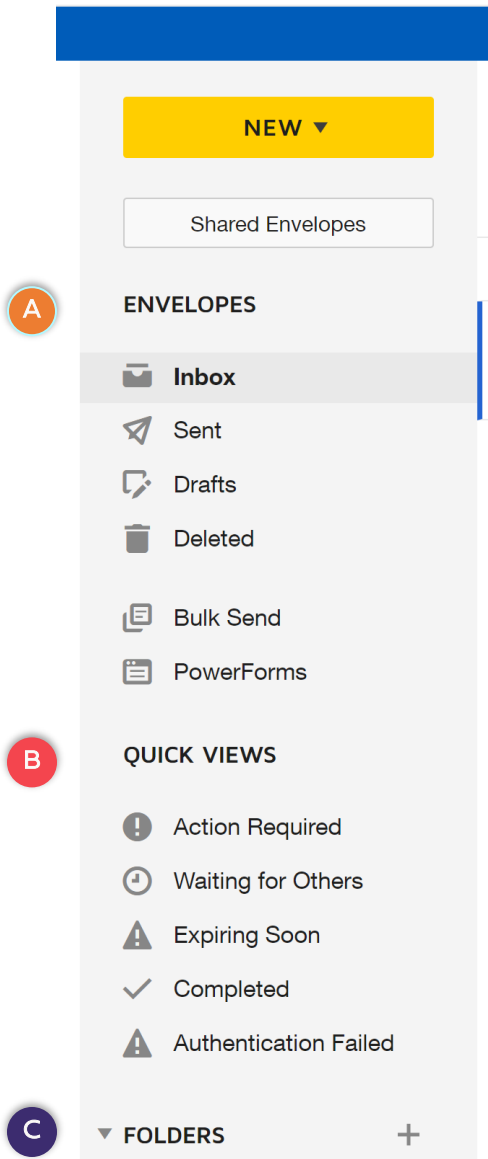
# Manage Screen

The "left navigation bar" is used to access:

- Envelopes (email box)
- Quick Views
- Folders

**Note:**

Quick Views are available for access on the Home Screen.



**A** Envelopes

This area allows the salesperson to easily check their Inbox and Sent emails.

Checking your Inbox

- This is where you will find email which were sent to prospects.
- You will have multiple actions available.

**B** Quick Views

The quick view functions act as a filter for the envelopes in a particular status (within the inbox).

- Action Required filters items broker needs to take an action on.
- Waiting for Others filters items that the prospect needs to take action on.
- Completed filters fully completed applications and are available for download.
- Expiring Soon will allow the salesperson to easily locate those items where the prospect has not yet taken the necessary action(s).
- Authentication Failed allows the salesperson to easily locate those items where the prospect did not utilize the correct "Access Code."

**Note:** To remove the filter, you have to click on the "Inbox" to discontinue filtering the content.






**C** Folders

- Each person can create their own folders to easily store "Completed" or "Cancelled" applications (emails).

## Inbox - Sent

Here is an example of what an Inbox might contain.

Note the different "Status" indicators.

Sent				Search Sent and Folders	FILTERS
Filtered by: Date (Last 6 Months)   Edit					
	Subject	Status	Last Change		
<input type="checkbox"/>	 <b>Please DocuSign: 2020 BSC MAPD PPO Enrollment Form</b> To: Demo Broker, John Recipient <a href="#">+2 more</a>	Need to Sign	4/8/2020 09:21:46 am	<b>SIGN</b>	<ul style="list-style-type: none"> <li>Resend</li> <li>Move</li> <li>Correct</li> <li>Create a Copy</li> <li>Void</li> <li>History</li> <li>Form Data</li> <li>Export as CSV</li> <li>Delete</li> </ul>
<input type="checkbox"/>	 <b>Please DocuSign: 2020 BSC MAPD PPO Enrollment Form</b> To: Demo Broker, Annie Recipient <a href="#">+2 more</a>	Completed	4/7/2020 04:02:44 pm		
<input type="checkbox"/>	 <b>Please DocuSign: MS Dental Specialty application- english with second prospect....</b> To: Demo Broker, Test Recipient <a href="#">+2 more</a>	Completed	4/7/2020 03:07:25 pm		
<input type="checkbox"/>	 <b>Please DocuSign: 2020 BSC MAPD Dental Enrollment Form</b> To: Demo Broker, Sam Prospect <a href="#">+1 more</a>	Declined	4/7/2020 09:49:39 am		
<input type="checkbox"/>	 <b>Please DocuSign: 2020 BSC MedSupp Dental Enrollment Form</b> To: Demo Broker, Test Prospect <a href="#">+1 more</a>	Completed	4/7/2020 09:04:21 am	<b>MOVE</b>	<ul style="list-style-type: none"> <li>Forward</li> <li>Create a Copy</li> <li>History</li> <li>Form Data</li> <li>Export as CSV</li> <li>Delete</li> </ul>

Looking for more? | [Edit your filters](#)

## Status Indicators

-  Need to Sign
-  Declined
-  Complete

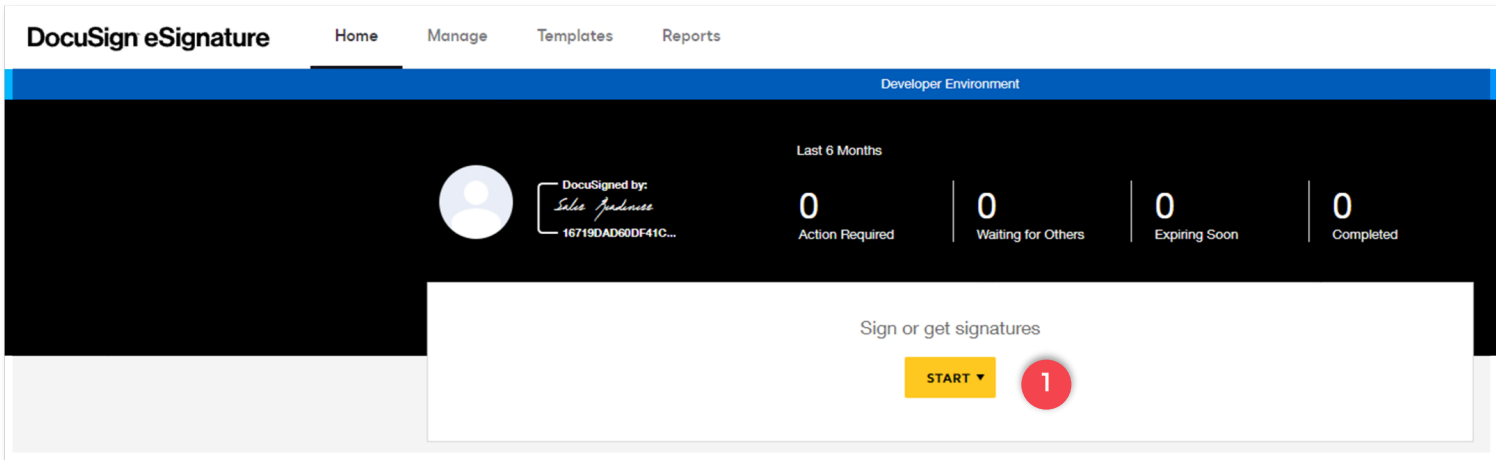
Please don't use the **Correct** function and try not to **Void** applications.

## Start an Application

There are several methods for starting an application.

This reference document will focus on the template method only.

For other methods such as "Send an envelope," please consult your Broker Manager for assistance.

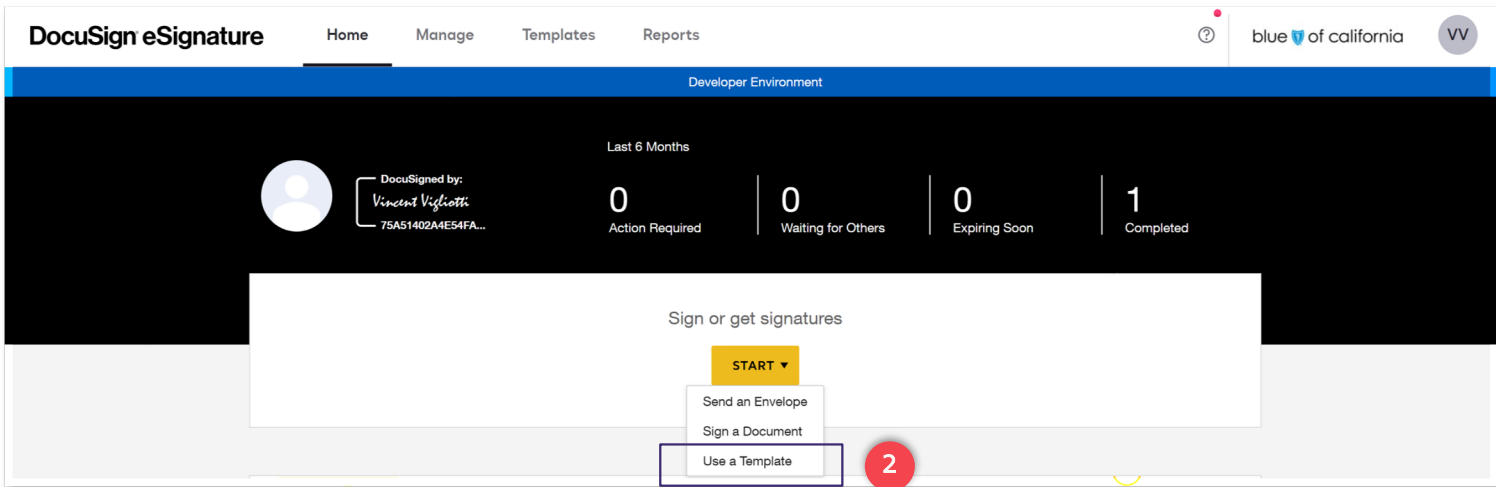


## Use a Template Method

1. On the "Home" Page you will click on the <Start> button.

A dropdown will appear with several options.

2. From the drop-down list you will select <Use Template>.





# Expand Folder

Expand the year folder to view application type folders.

(HHS) = Household Savings Section of Medicare Supplement Application Template is enabled.

(No HHS) = Household Savings Section of Medicare Supplement Application Template is not enabled.

If you need to do a set of HHS applications for 2 people in the same household, it is suggested you contact your Broker Sales Manager for the first time.

**Select Template**

My Templates

Shared with Me

All Templates

Favorites

	Name	Owner	Last Change
<input type="radio"/>	(Spanish) 2022 BSC MedSupp (no HHS)	Eric Storm	2/17/2022   11:46:59 am
<input checked="" type="radio"/>	2022 BSC MedSupp (no HHS)	Eric Storm	2/17/2022   11:45:40 am
<input type="radio"/>	(Spanish) 2022 BSC MedSupp Dental Enrollment Form (no HHS)	Eric Storm	10/7/2021   03:38:12 pm
<input type="radio"/>	2022 BSC MedSupp Dental Enrollment Form (no HHS)	Eric Storm	10/6/2021   09:13:33 am

**FOLDERS**

**SHARED FOLDERS**

- 072020-MedSupp
- ▶ 2020
- 3 ▼ 2022
  - MedSupp - Household
  - 4 MedSupp - Individual
  - MedAdv
  - Other
  - PDP

6 **ADD SELECTED**
CANCEL

## Steps

3. To expand the list of Folders, click on the ► next to "Shared Folders".

The Select Templates screen will display.

4. Select application type folder to display application templates.

5. Select an application template in the language of choice.

6. Click the <ADD SELECTED> button

### IMPORTANT

You must click on the arrow to expand the folders.

Clicking on the folder or the name does not expand the folder list.

# Add Recipients to the Envelope

After selecting the appropriate template(s), move to the "Add Recipients to the Envelope" section and fill in the **Sender** and **Prospect** information.

An Access Code is required. Give the code to the Prospect while on the Phone. Do not email it to them.

Important information

2022 BSC MedSupp (no HHS)

**Recipients**

1

**Sender** NEEDS TO SIGN CUSTOMIZE

**Name \***  
Vincent

**Email \***  
Vincen

7

**Prospect** NEEDS TO SIGN CUSTOMIZE

**Name \***  
Prospect

**Email \***  
prospect@email.com

8

2

**Access Code**

Enter access code \* **← REQUIRED**

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.  
Your template requires this recipient to have an access code.

**DO NOT USE** any of the following:

- The same number or numbers repeated (example: 121212)
- The same letter or letters repeated (example: aaaaaa)

## Steps

7. The Sender field is automatically embedded broker name and email.

[Complete the Prospect information.](#)

**Note:**  
The Prospect Name field needs to match the Medicare card of the prospect.

8. Use one of the following layouts for the Access Code.

- Prospects initials plus their zip code.
- Prospects initials plus the last 4 digits of their phone number.
- First 3 letters of the Prospects last name plus the last for digits of their phone number.
- A minimum of 6 characters is required.

## Sending the Application

The 4<sup>th</sup> box is the Sender, who is the Broker. This will route the Prospect signed application back to the Broker for review and final broker signature.

**NOTE:**

The "cc" has been auto-populated to copy the BCS enrollment team. This cannot be removed or modified.

2022 BSC MedSupp (no HHS)

This code is available for you to review on the Envelope Details page.  
Your template requires this recipient to have an access code.

**Sender** NEEDS TO SIGN CUSTOMIZE

**Name \***  
Vincent

**Email \***  
Vincent

**cc** CC RECEIVES A COPY CUSTOMIZE

**Name \***  
MS Install

**Email \***  
msinstall@blueshieldca.com

**Envelope Custom Fields**

**Message to All Recipients**

Custom email and language for each recipient

**Email Subject \***  
Please DocuSign: 2022 BSC MedSupp (no HHS)  
Characters remaining: 58

**Email Message**  
Enter Message  
Characters remaining: 10000

**Advanced Options | Edit**

- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 0 day(s) before request expires
- Comments are enabled
- Senders can use either quick send or advanced edit

**9** 4

**5**

**11** SEND ADVANCED EDIT DISCARD

## Steps

The last section on the Adding Recipients is the Message to All Recipients section.

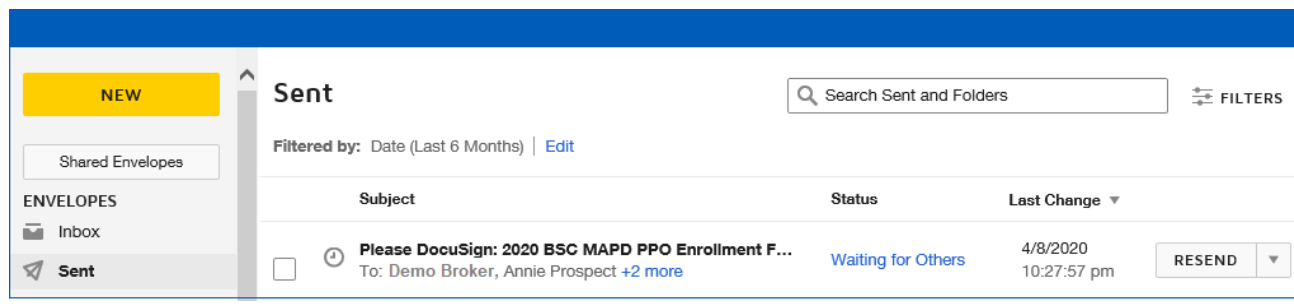
A standard message is included in the email, however the Broker can customize the message included in the email to the Prospect.

9. Confirm the Broker name and email is correct.
10. Enter a short email message.
11. Click the <Send Now> button.

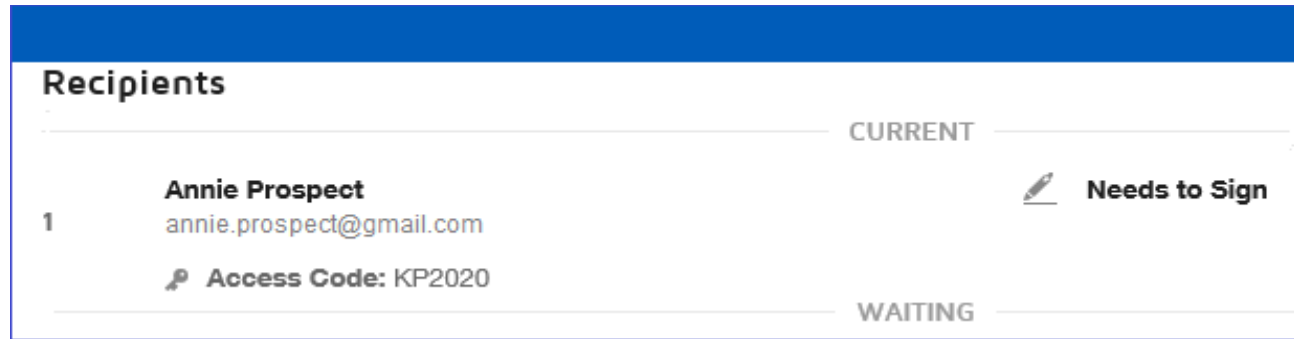
## Forgotten Access Code

An Access Code is required by the system. The Prospect cannot access the document without this code.

A



B



## Steps

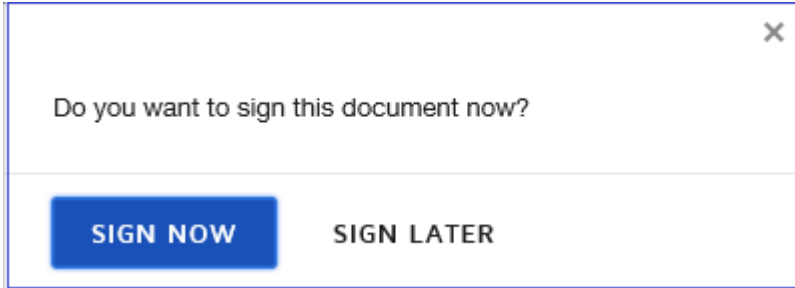
If the prospect forgets the code you will need to do the following:

- A. In the "Sent" folder, locate the item for the specific Prospect and click anywhere on the bolded title.
- B. In the "Sent" folder, locate the item for the specific Prospect. The Access Code will be displayed.

## Adding Recipient(s)

The following screen will display for the Broker.

12



**Note:**  
*At this point you are initiating a transaction. Each transaction results in a new packet or “envelope”. This should only be initiated once you are sure of the plan the prospect wants to purchase.*

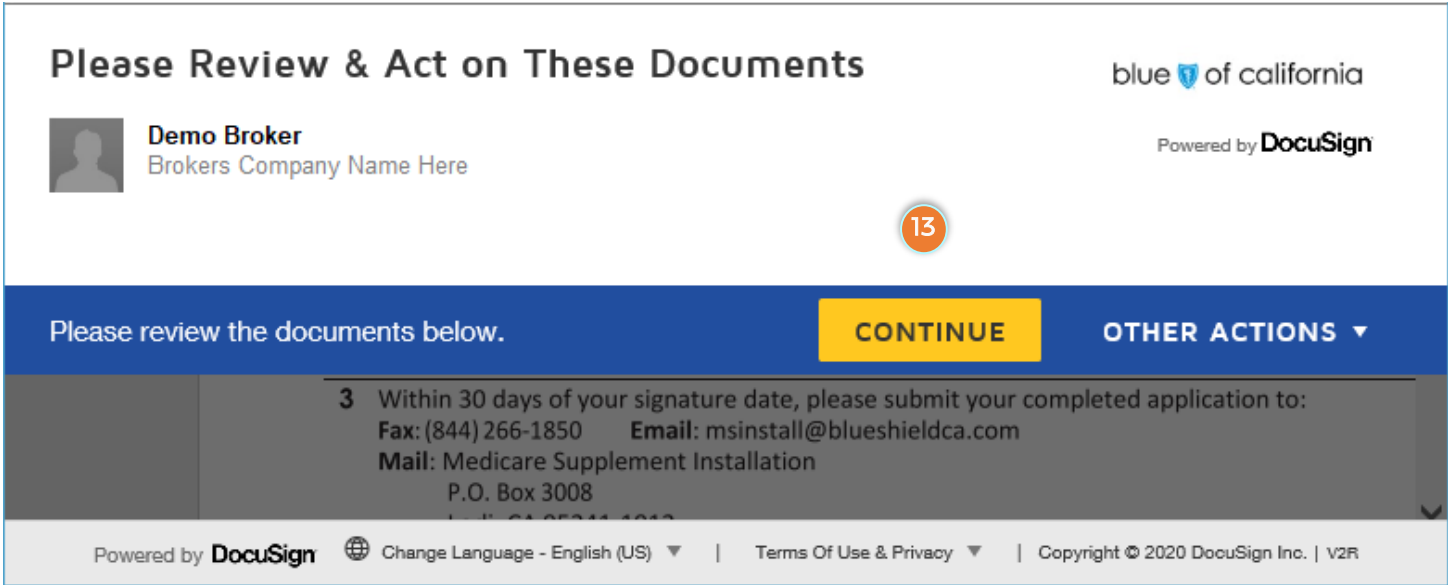
## Steps

- 12. Click the <Sign Now> button.


The template is sent to the **BROKER** to fill-in the application with the Prospect on the phone.

## Pre-Filling the Application


The "fillable" template will display in the background.



**Please Review & Act on These Documents**

blue  of california


Powered by **DocuSign**

 **Demo Broker**  
Brokers Company Name Here

13

Please review the documents below. **CONTINUE** OTHER ACTIONS ▾

**3** Within 30 days of your signature date, please submit your completed application to:  
**Fax:** (844) 266-1850 **Email:** msinstall@blueshieldca.com  
**Mail:** Medicare Supplement Installation  
 P.O. Box 3008  
 Los Angeles, CA 90011-3008

Powered by **DocuSign**  Change Language - English (US) ▾ | [Terms Of Use & Privacy](#) ▾ | Copyright © 2020 DocuSign Inc. | V2R

## Steps

13. Click <CONTINUE> and proceed to fill-in the application with the prospect on the phone.

## Pre-Filing the Application

The selected application template will display.

For this example Medicare Supplement has been used.

From the first field, you then have the option to use:

- "FILL IN" - "Choose" - "Next" Tag  
(Not recommended - can be tedious and slow)
- Tab Key
- Mouse (Recommended)
- Scroll (Recommended)

Use of the [scroll bar](#) or [mouse](#) are recommended for ease in movement through the template.

Please review the documents below. **FINISH** OTHER ACTIONS ▾

DocuSign Envelope ID: 495E948F-81B7-4B98-A020-8CDEA84975F6

**START** 14

Application for  
**Blue Shield of California Medicare Supplement plans**

**Here's how to apply**

- 1 Provide ALL requested information and print clearly in all capital letters in black ink.
- 2 Sign and date in all places indicated.
- 3 Within 30 days of your signature date, please submit your completed application to:  
Fax: (844) 266-1850 Email: msinstall@blueshieldca.com  
Mail: Medicare Supplement Installation  
P.O. Box 3008  
Lodi, CA 95241-1912
- 4 It is required that a signed copy of this contract is made for your records. Be sure to keep the second copy of this application with all other important Blue Shield of California documents and information.

Please note, if you are a current Blue Shield Medicare Supplement plan member interested in applying for Plan F Extra, you must fill out this application. **Plan F Extra will only be available to applicants who attain age 65 before January 1, 2020, or first become eligible for Medicare benefits due to disability before January 1, 2020.**

**Personal information**

First name  Middle initial  Last name

Home address

City  State  ZIP

Home telephone

Email address

## Steps

14. By clicking on the **<START>** flag on the left of the screen you will be taken to the first required field.

The **red** boxes indicate where the prospects data needs to be entered.

Note some fields require specific formatting.

The prospect's **Name** and **Email** is hidden for security and will populate once the form is completed and sent to the prospect.

### Pre-Filing the Application

The Broker information is filled in prior to sending the application to the Prospect.

However, the Broker will not sign until after the Prospect reviews and signs the application.

Select one radio button **FINISH** OTHER ACTIONS ▾

🔍 🔍 ⏴ 🖨️ 🗨️ ?

the best of my knowledge, the information on the application is complete and accurate. I understand that, if any portion of this statement by me is false, I may be subject to civil penalties of up to \$10,000.

**Notice:** Please ensure each part of the application is complete. In the event of missing or incomplete information, Blue Shield may contact your applicant directly to obtain complete information.

FMO/Agency name (please print appointed agency name)		FMO/Agency ID No. (please print agency ID)	
<input type="text"/>		<input type="text"/>	
Producer (writing agent) name (required) (please print writing agent name)		Producer (writing agent) SSN/TIN ID No. (required) (please print agent ID number)	
<b>Demo Broker</b>		<input type="text" value="1234567"/>	
Producer email address	Producer fax number	Producer phone number	
demo.broker@gmail.com	<input type="text"/>	<input type="text" value="444-111-1111"/>	
Producer's signature (required)	Print name	Today's date (required)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

**NEXT**

### Steps

- 15. Once all required information has been filled in, click the <FINISH> button.

Note:  
The Producer's Name, NPN ID and phone number are required. To look up your NPN, please visit:  
<https://npr.com/help/look-up-your-npn>

#### Important

Grey boxes are all fillable but optional.

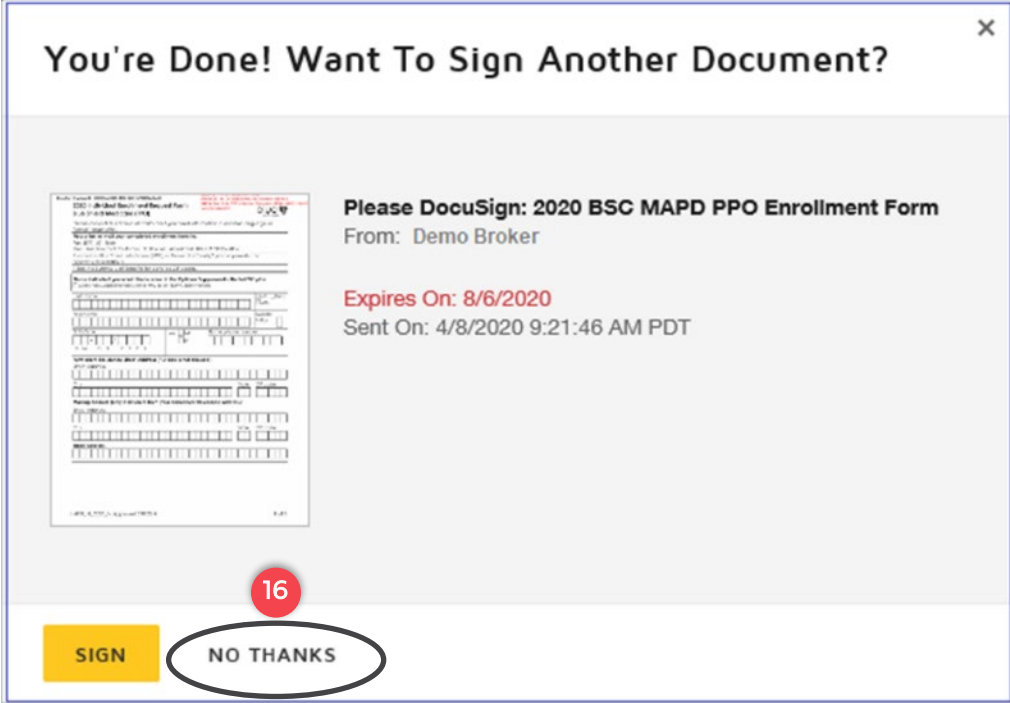
FMO information is required if the Broker is endorsed or currently writing business under an FMO. This is **critical** in the FMO and Broker being paid correctly.

Broker information is critical to complete even though it shown as optional.



## Pre-Filing the Application

Once finished, the "You're Done" screen will display.

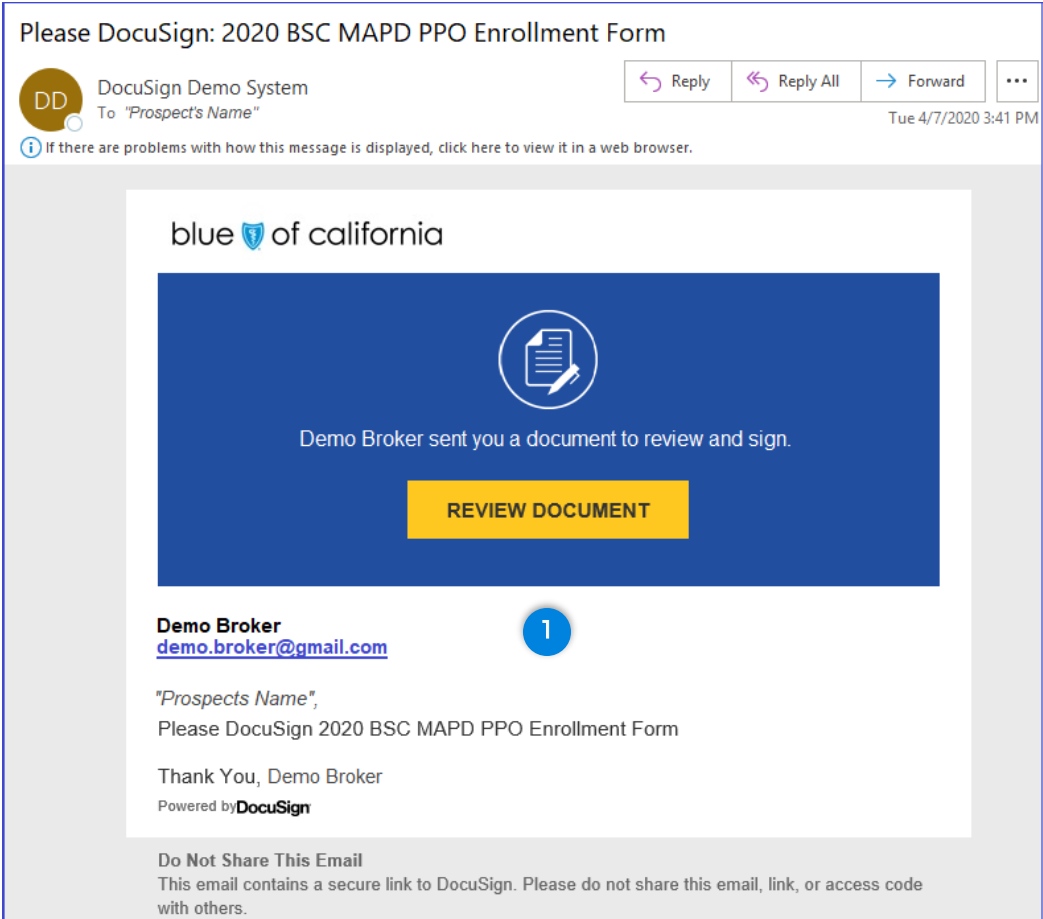


## Steps

- 16. Click the <NO THANKS> button to finish.

## Prospects Views and Actions

The Prospect should receive an email similar to the one shown.



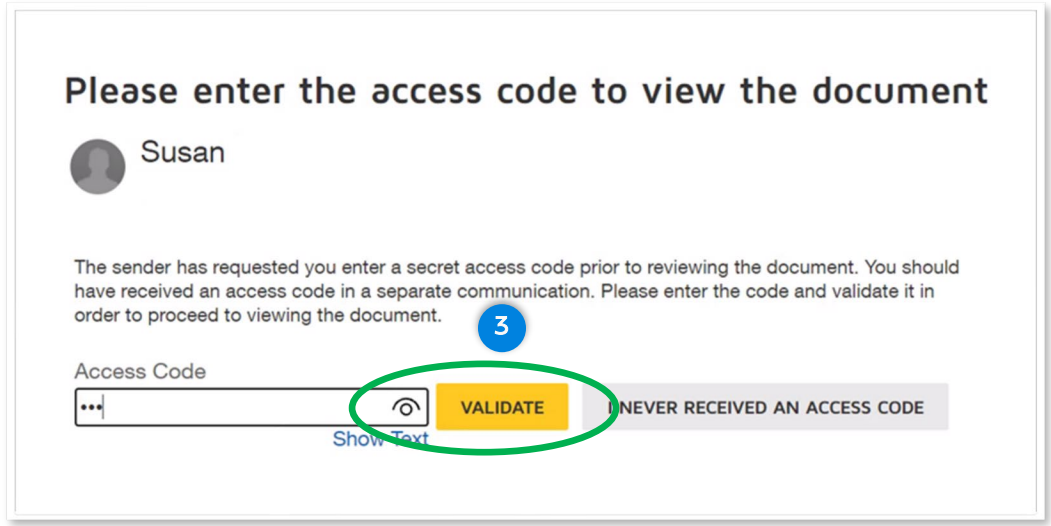
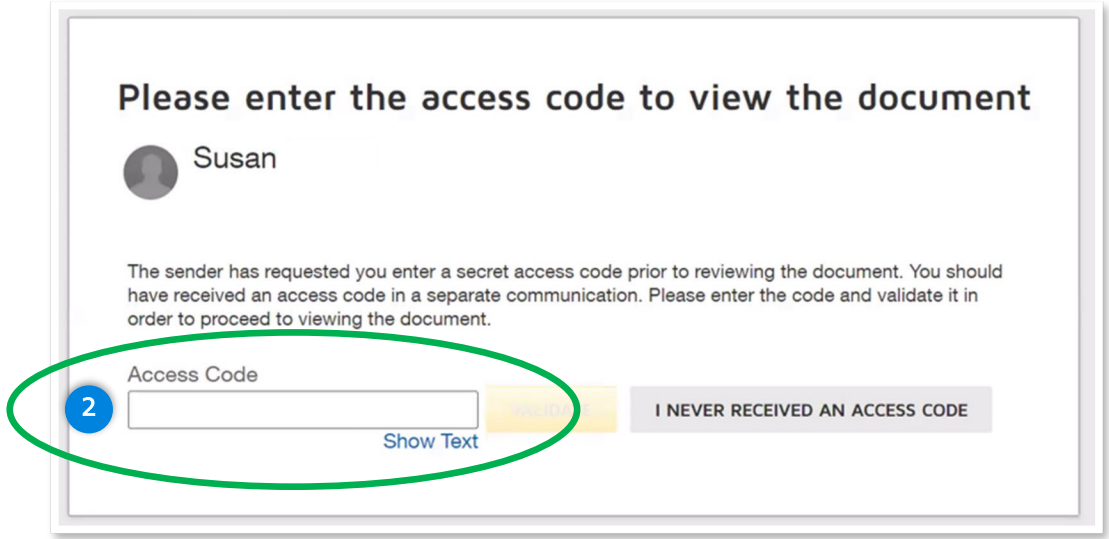
## Steps

1. Have the Prospect click the **<REVIEW DOCUMENT>** button.

### Prospects Views and Actions

Once the prospect click on the "Review Document" button from the email, a pop up will display advising "Please enter the access code to view the document".

Next the Prosect will need to click "Validate" to continue.



### Steps

- 2. The Prospect will be asked to enter an [Access Code](#)
- 3. Once the code is entered, they will need to click [<Validate>](#)

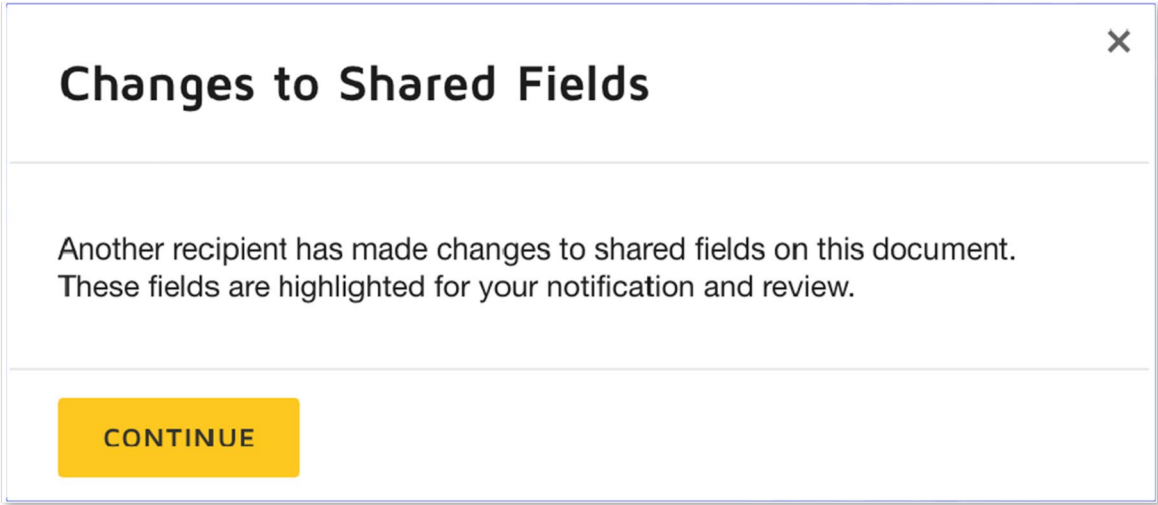
# Prospects Views and Actions

The document will start to load.

The "Changes to Shared Fields" notice will display every time an envelope is sent to a Prospect.

This is due to the Broker having filled in the application.

4



## Steps

- 4. A pop will appear the Prospect needs to click <Continue>.

This enables the Prospect to have knowledge of the fields that need to be reviewed.

## Prospects Views and Actions

The Prospect is now ready to validate the information on the application is correct.

The Prospect can make changes if needed.

If not, by clicking on the <START> button they will be move to the Signature process.

Please review the documents below. **FINISH** **OTHER ACTIONS** ▾

mail: Blue Shield of California, P.O. Box 748, Woodland Hills, CA 91365-7650

**Select the plan you want to join:**

- Blue Shield Inspire (PPO) Alameda County (\$99 per month)
- Blue Shield 65 Plus (HMO) Los Angeles/Orange Counties (\$0 per month)
- Blue Shield 65 Plus (HMO) Kern County (\$0 per month)
- Blue Shield 65 Plus (HMO) Riverside County (\$0 per month)
- Blue Shield 65 Plus (HMO) San Bernardino County (\$0 per month)
- Blue Shield 65 Plus (HMO) San Diego County (\$0 per month)
- Blue Shield 65 Plus (HMO) San Luis Obispo/Santa Barbara Counties (\$0 per month)
- Blue Shield 65 Plus (HMO) Ventura County (\$0 per month)
- Blue Shield 65 Plus Plan 2 (HMO) Los Angeles/Orange Counties (\$0 per month)
- Blue Shield 65 Plus Choice Plan (HMO) San Bernardino/Riverside Counties (\$0 per month)
- Blue Shield AdvantageOptimum Plan (HMO) Los Angeles/Orange Counties (\$0 per month)
- Blue Shield AdvantageOptimum Plan (HMO) Fresno County (\$0 per month)
- Blue Shield AdvantageOptimum Plan (HMO) Merced/Santa Clara Counties (\$0 per month)
- Blue Shield AdvantageOptimum Plan (HMO) Stanislaus County (\$0 per month)
- Blue Shield AdvantageOptimum Plan (HMO) San Joaquin County (\$0 per month)
- Blue Shield AdvantageOptimum Plan 1 (HMO) San Diego County (\$0 per month)
- Blue Shield AdvantageOptimum Plan 2 (HMO) San Diego County (\$0 per month)
- Blue Shield Balance (HMO) Los Angeles County (\$0 per month)

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## Steps

5. Select Start to begin.

**Note:** the first and last name of the Prospect has automatically filled into the application.

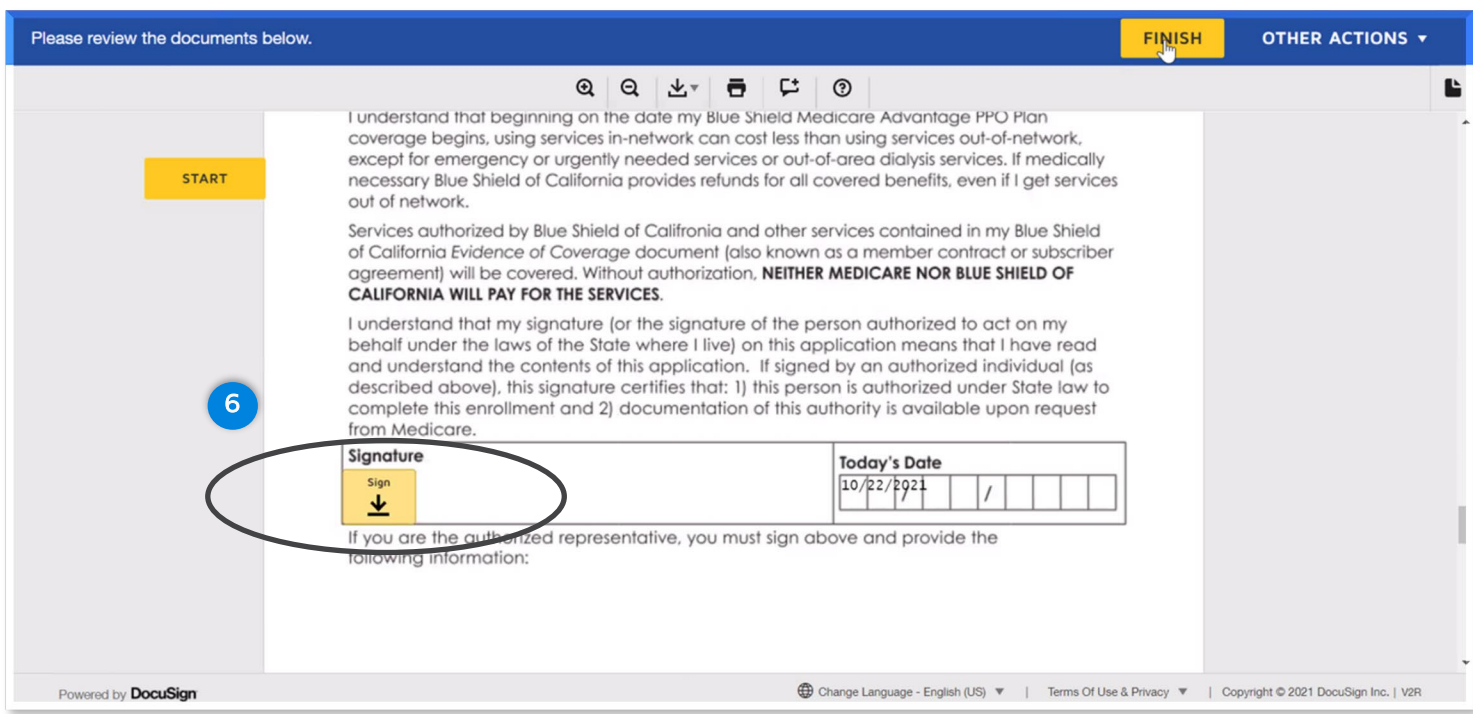
## Prospects Views and Actions

When the Prospect starts to sign and/or initial an application they will be taken to the "Adopt Your Initials or Adopt Your Signature" screen.

## Steps

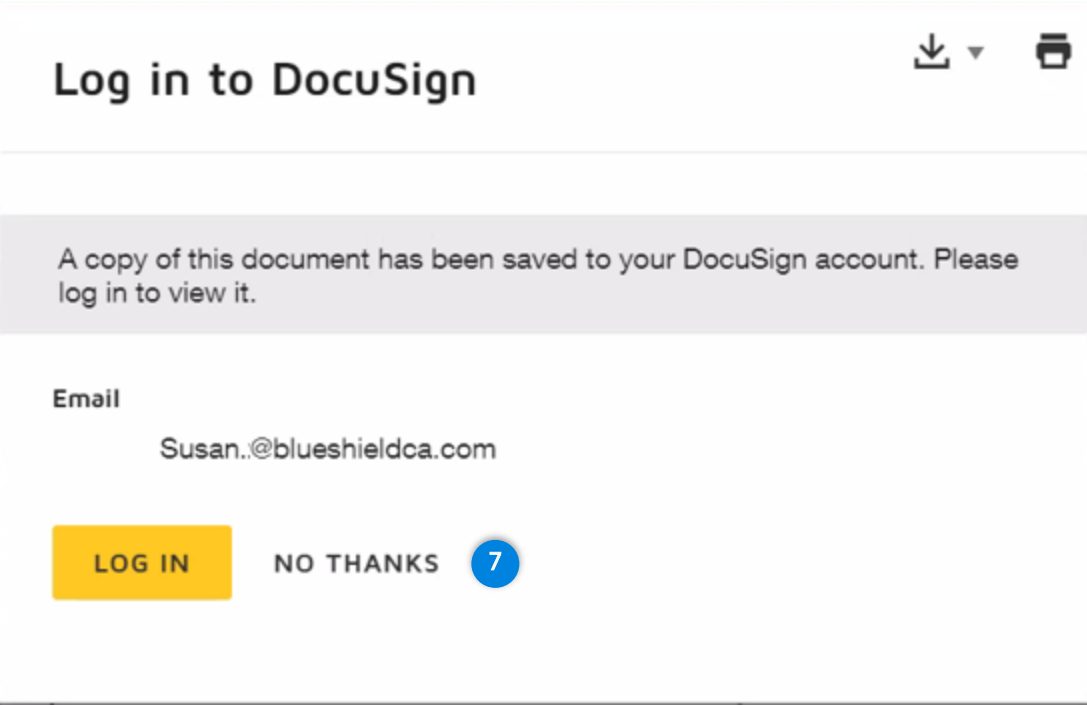
- 6. Click on "Sign"
- The Prospect signature can use a system generated signature.

**Note:** The Today's Date field will prepopulate



## Prospects Views and Actions

The Prospect will be given an opportunity to save the file.



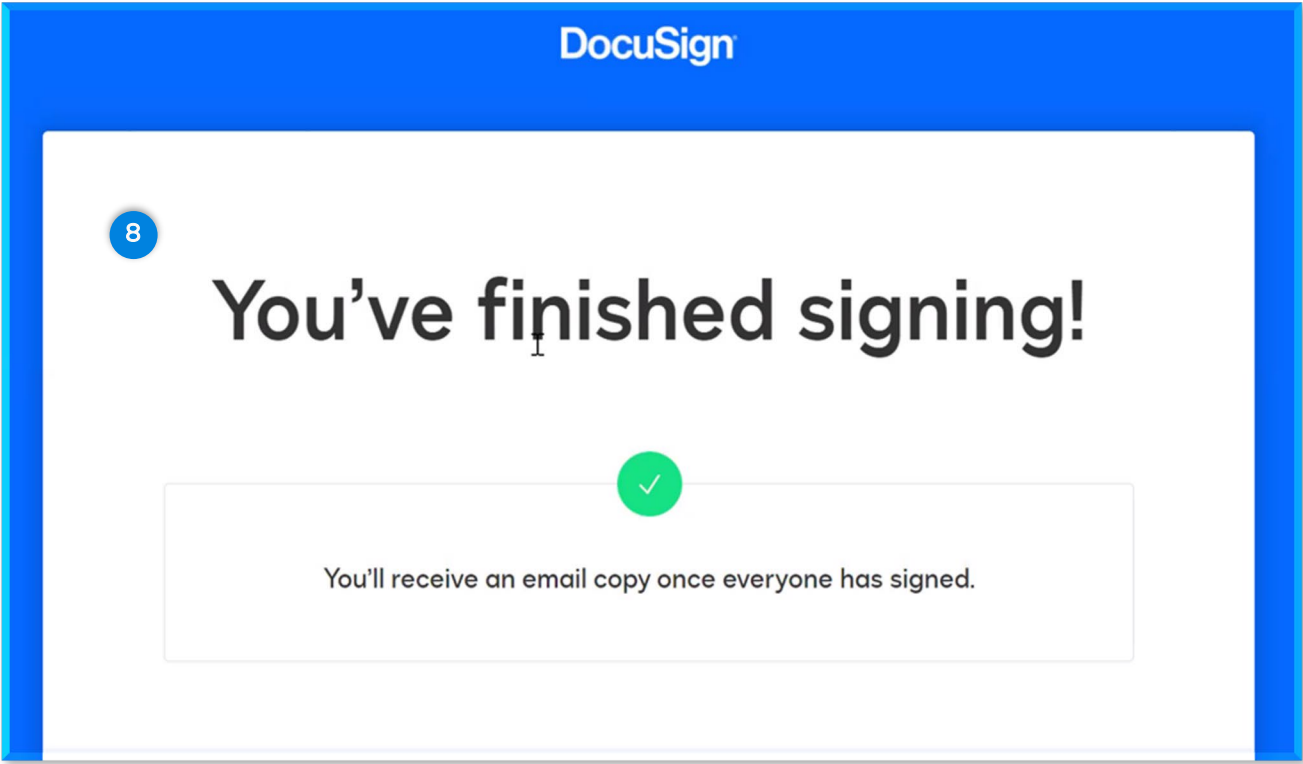
## Steps

- 7. The Prospect should click on <NO THANKS>.

The Prospect will receive a copy of the application once it completed and signed by the Broker.

### Prospects Views and Actions

Once all steps have been completed the Prospect will "You've finished signing!" screen will display.



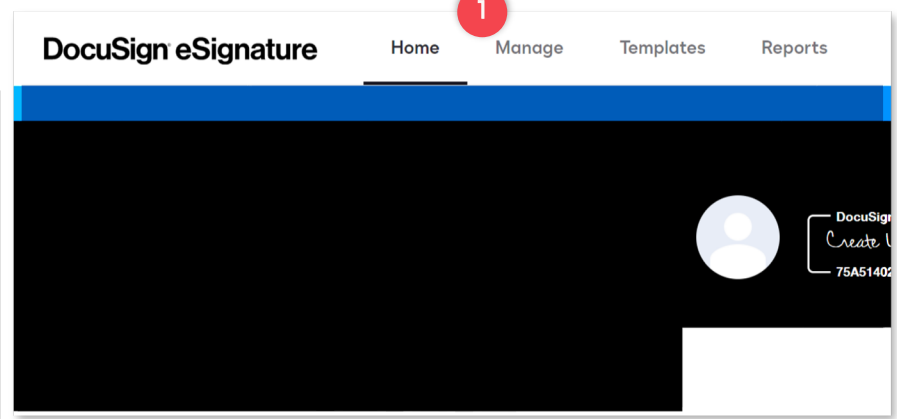
### Steps

- 8. Once completed the Prospect will be greeted with the "You've Finished signing!" message.



## Complete Application

Once the beneficiary signs the application, you will receive a notification that the application is ready for you to sign.



## Steps

1. To access your inbox, click on the "Manage" tab located at the top of your screen.
2. Click the < Inbox > option on the left side panel.
3. Click the < Sign drop-down menu > to sign and finish the application.

