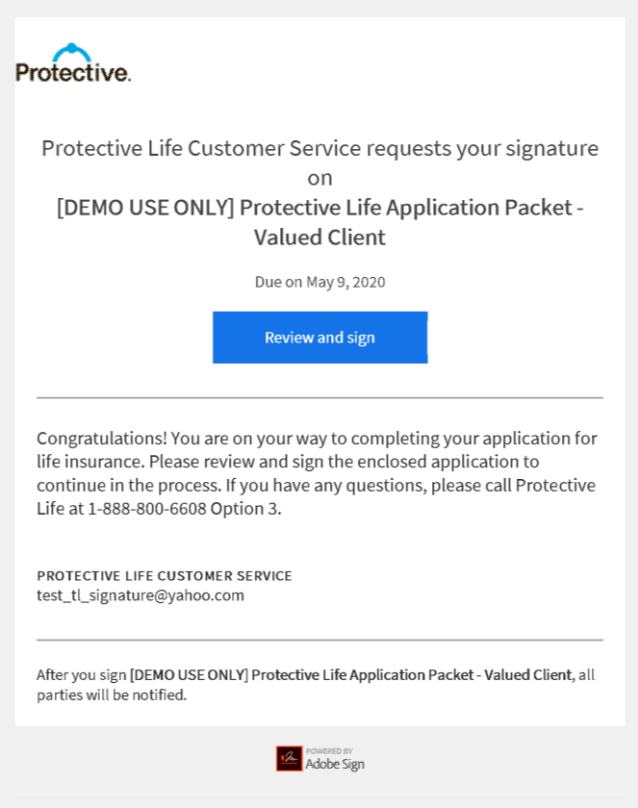
eSignature Customer Experience Job Aid

When following the electronic signature process in EZ-APP℠, your customer will be able to electronically sign the Application forms via email. This job aid provides you with an overview of the electronic signature process from the customer's prospective.

1 Initial Customer Email

This is an example of the initial email that the applicant will receive if you choose the electronic signature process in EZ-APP℠.

Instruct the applicant to click on **review & sign** to proceed.

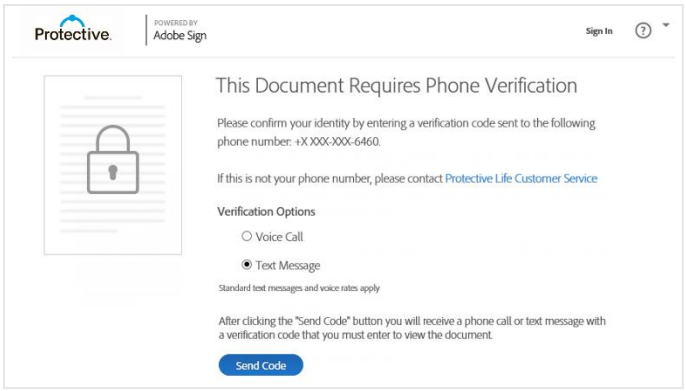


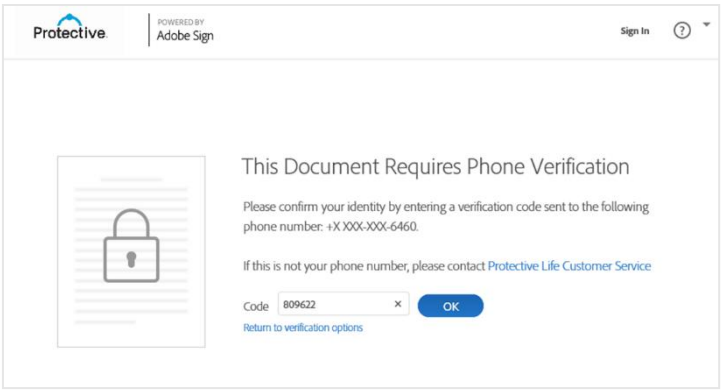
NOTE: The applicant will receive daily reminder emails until their application is submitted or the application expires in 30 days. This reminder email is identical to the initial one, except for the subject line, which will have "Reminder" added.

NOTE: If the applicant does not sign the application within 30 days or declines to sign the application, they will receive a notice of cancelation by email.

2 Authentication by Phone / Text

The applicant will be required to verify their identify. They can select to receive either a Voice Call or a Text Message to receive a verification code. When the applicant receives verification code from Adobe received via text or voice call, they will enter it into the text box labelled "Code:" Then, click "OK" to proceed.





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Protective

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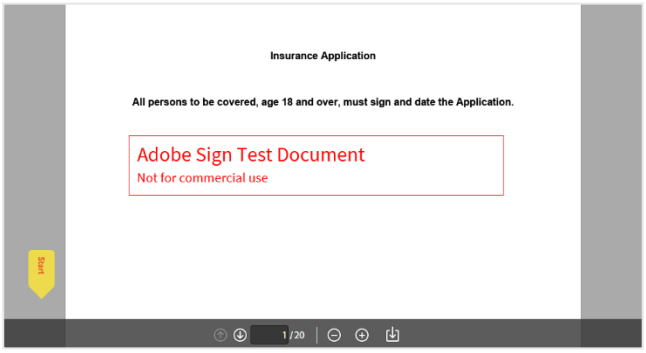
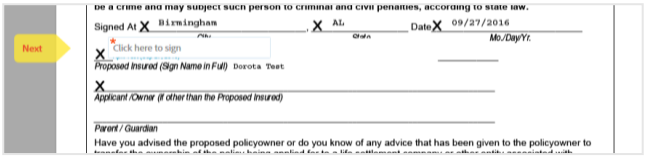
3 Viewing & Signing the Application

The applicant can click the yellow “Start” arrow or scroll to the first field to complete



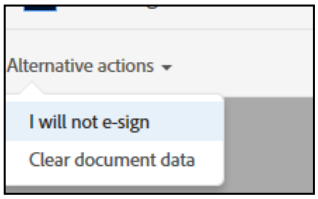
The yellow “Next” arrow will indicate a field to be completed by the applicant. The fields with a red star are required. Click “Next” or scroll to the next field.



To adopt a signature, the applicant will type their name in the Signature box and then click “Apply” to apply the signature to the form.

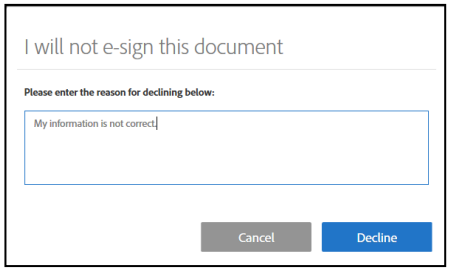
4 Correcting Errors on the Application

If the applicant identifies an error in the application they can select “I will not e-sign” from the Alternative Actions menu in the top left corner of the screen.



The applicant must include a reason for declining to e-sign. (example, “my name is spelled incorrectly on application.”)

Once a reason is entered, the applicant will click “Decline”.



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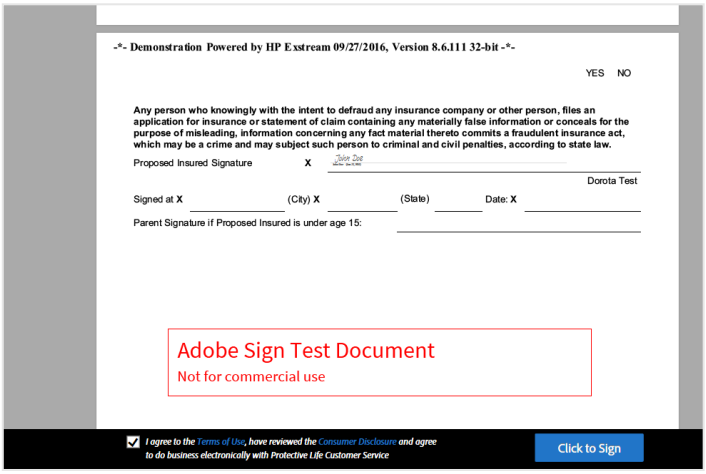
5 Submitting the Application

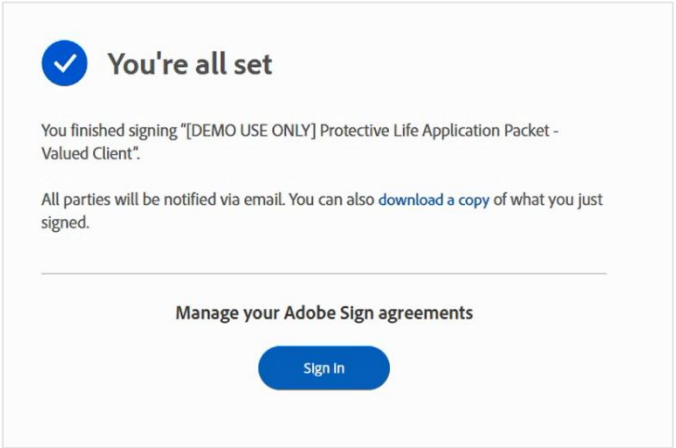
When every field is completed, the applicant must agree to the Terms of Use and the Consumer Disclosure. The Terms of Service and Consumer Disclosure are hyperlinks for the applicant to read the documents before clicking.

Once the Terms of Service has been accepted, the applicant can click “Click to Sign” to submit the application.



6 Downloading and Saving the Application

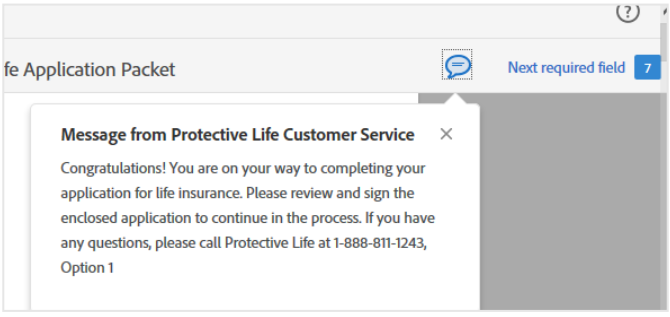
When the application is successfully submitted, the applicant has the option to download a copy of the application to a computer and save it.



7 Additional Features

On the top right corner of the application there are two features to assist the signer:

- The “Message from Protective Life Customer Service” displays the phone number for customer service.
- The “Next required field” shows how many fields are left to complete.



TIP! Clicking “Next required field” will navigate the page to the next field on the form to be completed.

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