

eDelivery

North American's new eDelivery process allows you and your client to review, sign, and download policy documents electronically, eliminating the need for in-person delivery. The new process will initially be available on cases that meet the following eDelivery eligibility requirements:

eDelivery eligibility requirements

The following criteria must be met for a case to be eligible for the eDelivery process:

- Application submitted via SimpleSubmit® or a paper application submitted with the eDelivery Consent Form
- New Business (Policy Change cases are not eligible at this time)
- Classic Term or ADDvantage® Term policy
- Proposed insured is the owner and payor
- Client provided an email address
- Email address on file for soliciting agent

How it works

To request eDelivery on an eApplication, simply answer the electronic delivery question "yes" within SimpleSubmit. To request eDelivery on a paper application, submit the eDelivery Consent Form with the application. When eDelivery is requested on a case that meets the eDelivery eligibility requirements, it will automatically go through the new process when a policy is issued. Below are the detailed steps that you and your client will experience when a policy is issued through the eDelivery process.

MGA Steps

We will send the MGA a secure email with a copy of the policy documents at the same time the email is sent to the writing agent. The MGA will not be required to sign any of the delivery requirements; the policy packet will be for informational use only. Status updates for the eDelivery process will be available on Paperless Pending.

Writing Agent Steps

- Shortly after the policy is issued, you will receive an email with a link to view the policy packet and sign the delivery documents. The sender of this email will be North American and the subject line will be **Policy ready to Sign**. Within the email, click on the **Review Documents** button. You will be taken to the NorthAmericanCompany.com log-in page, where you will enter your username and password. A summary page will appear that provides important policy information. Review the information on the summary page to ensure it is accurate.
*Note: To obtain a username and password for the North American website, navigate to NorthAmericanCompany.com and click the **Register** button in the upper right side of the page.*
- From the summary page, click the **Continue to DocuSign®** button within the email. You will be directed to DocuSign where you will be able to review, download, and/or print the policy packet and sign the delivery documents. The first time you access a policy packet you will need to review and consent to the 'Electronic Record and Signature Disclosure'. Click **Continue** to start reviewing the policy packet.
- Once you are in the policy packet, to navigate to the delivery documents, click Start. When you are at the first delivery document, click **Start**. Once in a delivery document, click the **Sign** and then the **Adopt and Sign** box. Your eSignature will automatically be applied and you will be brought to the next document that requires a signature. Click the **Sign** box for each additional delivery document that requires your signature. When all delivery documents have been signed, click **Finish**. A pop-up will appear with options to download and/or print the policy documents.

*Note: Once you have clicked **Finish**, we will send an email to your client for them to review, complete, and sign their policy documents. In general, this email will be sent within minutes of when you finish the eDelivery process.*