## **Prudential – eDelivery – Agent Instructions**

The following job aid includes step by step instructions to assist the agent in completing e-Signing process of an electronic policy.

**NOTE**: Individuals will receive the email with the policy link once it is their turn in the signing process. Forwarding an email will not provide access to the policy; the policy must be accessed through the link received in the automated email. A link to the policy envelope will be included in the email.

| Step | Action  | Screen Print/Example  |
|------|---|---|
| 1    | Open the Document<br>Notification Email - An<br>email message will be sent<br>includes a link to access the<br>document package.<br>Select Click here to access<br>your document package  | LeslieCarter's Life Insurance Policy is Now Available       Different         Leslie Carter's effective       Intervent         It on retain       Hello John,         Leslie Carter's ePolicy from General Life is now available online.       In order for Leslie to become fully covered, you need to electronically sign the delivery receipt. Click the link below to access the policy online.         Click here to access the color.       Image: Sincerely,         Doug Morgan       Mountain Top Distributors  |
| 2    | ( <i>First time users</i> ) <b>Register</b><br><b>Account</b> - Complete<br>registration by filling out the<br>fields on the screen and<br>choosing the <b>Create</b><br><b>Account</b> button.<br>Choose <b>Log In</b> in the pop<br>up window to automatically<br>log into DocFast.<br>The <i>username</i> displays in a<br>pop up window and is sent<br>in a separate confirmation<br>email. | Congratulations John,   your bocFast account!   Jour username is:   Jayor12235   Congratulations #   Water any consistent and access for any access the tableaut, consistent he tableaut, consist |
| 3    | Policy will <b>open</b> once logged<br>into DocFast.<br><b>Download PDF</b> to view and<br>save a copy of the policy with<br>a <i>watermark</i> (this is for records<br>only – cannot be used for physical<br>policy delivery)  | Image: Action       Back to My Deskboard         Documents       Image: Status: Received by Agent         Image: Document summary       Image: Status: Received by Agent         Image: Document Summary       Image: Status: Status: Status         Identification Number       56775454         Primary Consumer       John David         Identification Number       56775454         Primary Consumer       John David         Identification Number       66775454         Primary Consumer       John David         Oblivery Expiration Date       May 6, 2017         Annual Premitum       Activity History         Date       Activity History         Apr 24, 2017 10:58:55       Aaron Cruz Viewed new document detail for their         Apr 24, 2017 10:58:56       Aron Cruz Viewed new document detail for their         Apr 24, 2017 10:58:56       Aron Cruz Viewed new document detail for their         Apr 24, 2017 10:58:56       Aron Cruz Viewed new document detail for their         Apr 24, 2017 10:58:64       Distributor Case Manager Donald Jones sent   |

Not intended for public distribution. To be used as a reference tool for e-Delivery only.

| 4 | Acceptable for Delivery:<br>Select e-Sign and e-<br>Deliver to Consumer.<br>This will begin the signing<br>process (see step 5)<br>Not Acceptable for<br>Delivery: Select Decline<br>Offer and provide reason<br>policy changes are<br>needed (change term period,<br>face amount, etc.)   | Image: Sign and e-Deliver to Consumer       Image: Sign and e-Deliver to Consumer         Image: Decline Offer       Image: Sign and e-Deliver         Image: Decline Offer       Image: Sign and Hand Deliver         Document Summary       Image: Signer Status         Identification Number       56775454         Primary Consumer       John Daxid         Identification Number       62775454         Delivery Expiration Date       May 6, 2017         Annual Premium       Not Sent         Annual Premium       Not Sent         Annual Premium       Not Sent   |
|---|--|--|
| 5 | To <b>e-Deliver</b> policy:<br>The signing process will<br>begin by clicking the<br><b>CONTINUE</b> and <b>START</b><br>button at the top left of the<br>page.<br>All policy pages <i>must</i> be<br>reviewed to ensure<br>accuracy of information.<br>Select <b>NEXT</b> on the left of<br>the screen to navigate and<br>append signatures and<br>dates to the requirements<br>by selecting <b>SIGN</b> . | <text><text><text><image/></text></text></text>  |
| 6 | If at any time throughout<br>the signing process you<br>wish to stop, select <b>Other</b><br><b>Actions &gt; Finish Later.</b><br>Information will be saved,<br>and can be re-accessed<br>via the email link.<br>When ready to proceed<br>with signing, select <b>Start</b><br>on the left-hand side.  | Please review the documents body.     PINISH     OTHER ACTIONS T       Conclusion Everyon 40: Action 100 Secondary 100 Secondar  |
| 7 | Progression through all<br>required Delivery<br>Requirements will occur.<br>The signature and date<br>will pre-populate with the<br>current date and affix to<br>the form.   | If the policy fastiares described shore; do not adoptatibly most your life<br>instance needs, please downsis this with your promotative.     Acknowledgment of Life Insurance Policy Delivery     Colors     Colors     Colors here if policy was defored by mail and explored by fulgabore.     Please term a signed way of this form in the souch by fulgabore.     I confirm that this policy smaller L683(716) has been defored by methods.     Colors     Co |

| 8  | Once all signatures have<br>been affixed to the<br>delivery forms, select<br><b>Finish</b> in the top right-<br>hand corner.<br>*A form will display to e-<br>Deliver the document to<br>the Consumer*                                 | Index care random     Other A COLORD  |
|----|--|---|
| 9  | Enter client's name and<br>email at the top of the<br><b>Consumer Signature</b><br>form.<br>Add custom message in<br>the <b>Custom Text</b> field if<br>desired.<br>Select <b>Send Message to</b><br><b>Client</b> when complete.      | Consumer Signature       Notices Entity       Signature       Signature |
| 10 | A <i>success</i> message will<br>display when an email has<br>been sent to the<br>Consumer.<br>The Agent Status will turn<br><i>green</i> and Signer Status<br>will display Agent as<br><b>Completed Accepted</b><br><b>Signature.</b> | Status: Sent to Consumer      Carrier     Distributor     Agent     Consumer      Signer Status      Name     Signer Role     Signer / Attachment Status     Action     Cruz, Aaron     Agent     Completed Accepted Signature     David, John     Insured     Delivered Awaiting Signature     Resend  |
| 11 | The client will receive an<br><i>email</i> prompting them to<br>access the policy by first<br>completing the<br>authentication steps.<br>They will select <b>Access</b><br><b>Your Policy</b> to begin the<br>signing process.         | Vour the Haurance policy is available for review [sec.]<br>Markoline of the optimal policy is available for review [sec.]   |