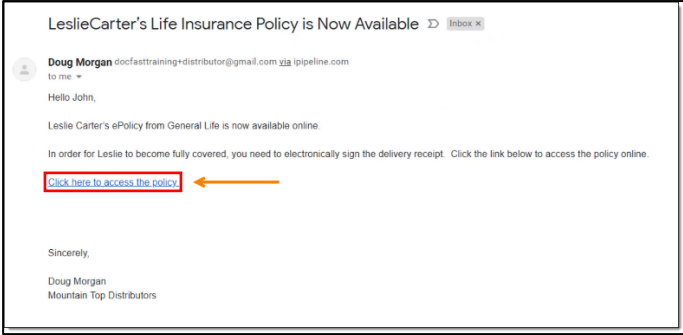
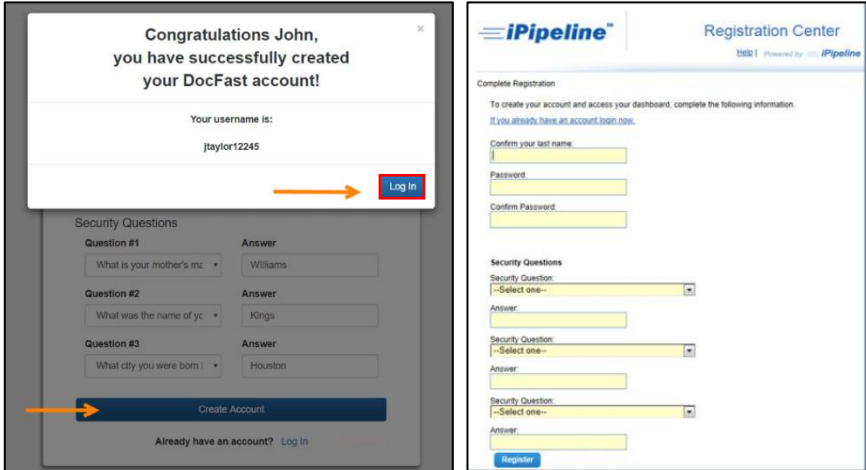
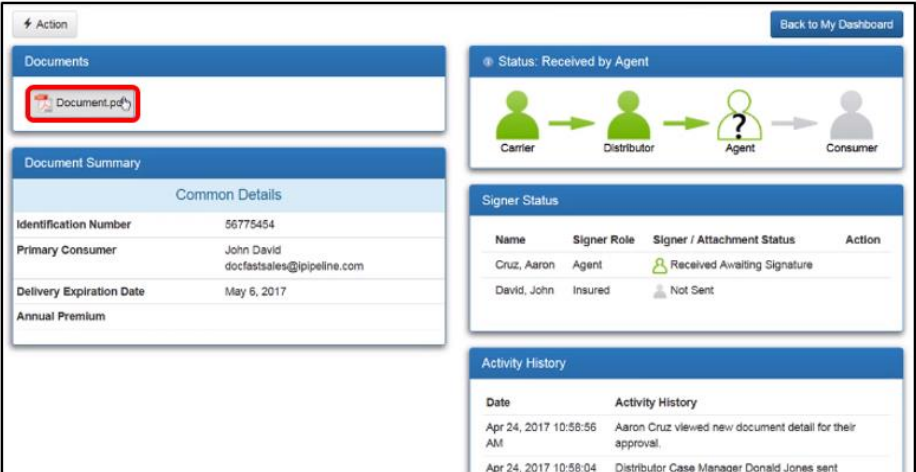
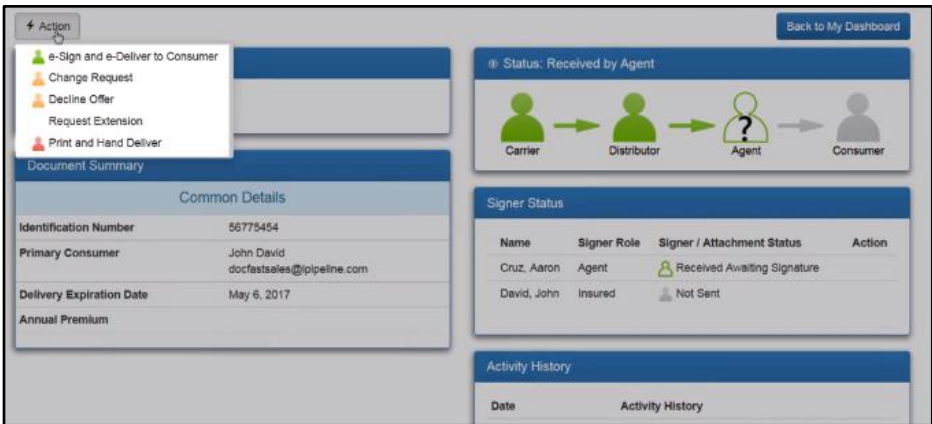
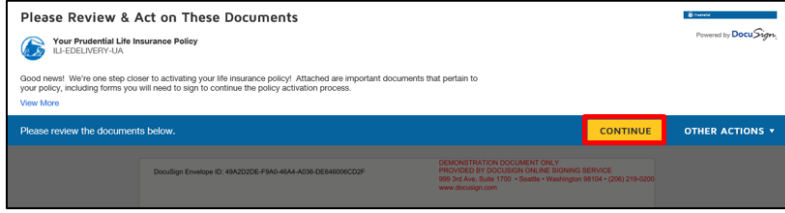

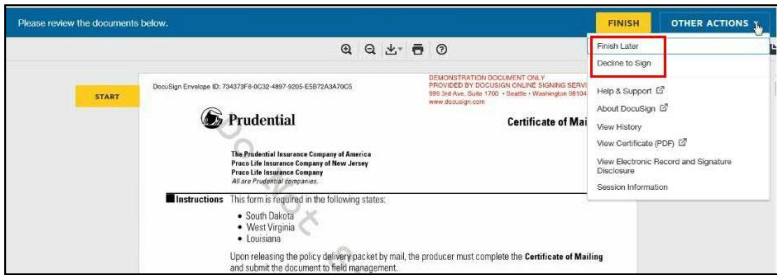



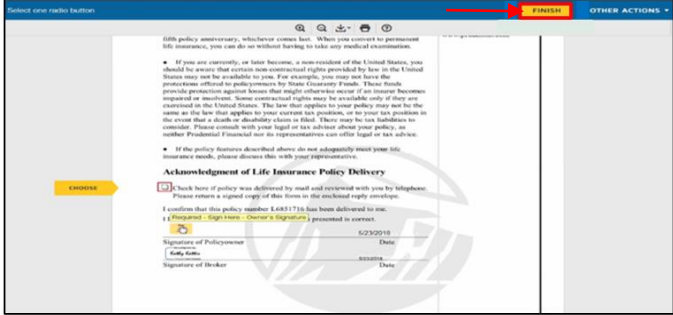
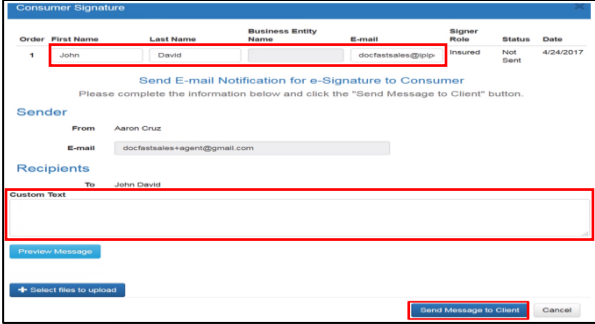

Prudential – eDelivery – Agent Instructions

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	<p>Open the Document Notification Email - An email message will be sent includes a link to access the document package.</p> <p>Select Click here to access your document package</p>	
2	<p>(First time users) Register Account - Complete registration by filling out the fields on the screen and choosing the Create Account button.</p> <p>Choose Log In in the pop up window to automatically log into DocFast.</p> <p>The <i>username</i> displays in a pop up window and is sent in a separate confirmation email.</p>	
3	<p>Policy will open once logged into DocFast.</p> <p>Download PDF to view and save a copy of the policy with a <i>watermark</i> (this is for records only – cannot be used for physical policy delivery)</p>	

<p>4</p>	<p>Acceptable for Delivery: Select e-Sign and e-Deliver to Consumer. This will begin the signing process (see step 5)</p> <p>Not Acceptable for Delivery: Select Decline Offer and provide reason policy changes are needed (change term period, face amount, etc.)</p>	
<p>5</p>	<p>To e-Deliver policy: The signing process will begin by clicking the CONTINUE and START button at the top left of the page.</p> <p>All policy pages <i>must</i> be reviewed to ensure accuracy of information.</p> <p>Select NEXT on the left of the screen to navigate and append signatures and dates to the requirements by selecting SIGN.</p>	<p>Select CONTINUE and START to begin the review process.</p>  <p>THUMBNAILED – Click on the Thumbnails icon to view each page individually OR select the NEXT button to navigate to the required signing fields.</p> 
<p>6</p>	<p>If at any time throughout the signing process you wish to stop, select Other Actions > Finish Later. Information will be saved, and can be re-accessed via the email link.</p> <p>When ready to proceed with signing, select Start on the left-hand side.</p>	
<p>7</p>	<p>Progression through all required Delivery Requirements will occur.</p> <p>The signature and date will pre-populate with the current date and affix to the form.</p>	

<p>8</p> <p>Once all signatures have been affixed to the delivery forms, select Finish in the top right-hand corner.</p> <p>*A form will display to e-Deliver the document to the Consumer*</p>														
<p>9</p> <p>Enter client's name and email at the top of the Consumer Signature form.</p> <p>Add custom message in the Custom Text field if desired.</p> <p>Select Send Message to Client when complete.</p>														
<p>10</p> <p>A <i>success</i> message will display when an email has been sent to the Consumer.</p> <p>The Agent Status will turn <i>green</i> and Signer Status will display Agent as Completed Accepted Signature.</p>		 <table border="1"> <thead> <tr> <th>Name</th> <th>Signer Role</th> <th>Signer / Attachment Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Cruz, Aaron</td> <td>Agent</td> <td>Completed Accepted Signature</td> <td></td> </tr> <tr> <td>David, John</td> <td>Insured</td> <td>Delivered Awaiting Signature</td> <td>Resend</td> </tr> </tbody> </table>	Name	Signer Role	Signer / Attachment Status	Action	Cruz, Aaron	Agent	Completed Accepted Signature		David, John	Insured	Delivered Awaiting Signature	Resend
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Cruz, Aaron	Agent	Completed Accepted Signature												
David, John	Insured	Delivered Awaiting Signature	Resend											
<p>11</p> <p>The client will receive an <i>email</i> prompting them to access the policy by first completing the authentication steps.</p> <p>They will select Access Your Policy to begin the signing process.</p>		