

# eDelivery

North American's eDelivery with DocuSign<sup>®</sup> process allows you and your client to review, sign, and download policy documents electronically, eliminating the need for in-person delivery. The process is 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 North American's eDelivery with DocuSign process:

- Application submitted via SimpleSubmit<sup>®</sup> or a paper application submitted with the eConsent form (form number O-2000)
- New Business (Policy Change cases are not eligible at this time)
- Classic Term, ADDvantage<sup>®</sup> Term or Custom Guarantee<sup>®</sup> Universal Life policies
- 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 eConsent form with the application. When eDelivery is requested on a case that meets the eDelivery eligibility requirements, it will automatically go through North American's eDelivery with DocuSign process when a policy is issued. Below are the detailed steps that you and your client will experience when a policy is issued through this process.

Although mobile devices are supported, for the best experience we recommend using a laptop or desktop computer when reviewing the policy packet and signing delivery documents. See the chart on page two for a complete list of software requirements.

## Managing General Agency (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<sup>®</sup>** button and 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.
- 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 your portion of the eDelivery process.



## Client Steps

- Shortly after you complete your portion of the eDelivery with DocuSign process, your client 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 **Your policy is ready to sign**. Within the email your client will click the **Review Documents** button which will take them to a webpage where they will need to enter their personal information to authenticate their identity.
- At the authentication page, your client will enter their *first name, last name, last four digits of their social security number, date of birth*, and then click the **Continue** button. As long as the system can match their information to a policy pending eDelivery, they will be taken to DocuSign. If the information entered cannot be matched, a message will appear that indicates this and to contact their agent for assistance.
- Before they can review, complete, and sign the policy documents, your client must review and consent to the 'Electronic Record and Signature Disclosure'. Once it has been viewed, your client will check the acknowledgment box and click the **Continue** button.
- Your client will be brought to the first page of the policy packet. Once they are ready to eSign, they can navigate to the first delivery document by clicking **Start**. Once in a delivery document, your client will need to complete the document if applicable and then click the **Sign** and the **Adopt and Sign** box. Their eSignature will be automatically applied and they will be brought to the next document that requires a signature. They will need to complete the same steps for each delivery document. When all delivery documents have been completed and signed, they will click **Finish**.
- A pop-up will appear with options to download and/or print the policy documents. Within this pop-up, clicking **Continue** will finalize the process and direct your client to a thank you page advising them they have successfully completed the eDelivery process.

Once all parties have completed their eSignatures, the delivery documents will be automatically transmitted to New Business for review and handling. The indicator that your client has completed the eDelivery process will be the receipt of the 'eSignature Requested with eDelivery' requirement. You may access the completed and signed policy documents using the link in your original email.

## Software requirements:

The following specifications will need to be met to access the policy packet and sign the delivery requirements:

### Desktop Support:

- Chrome (latest)
- Firefox (latest, 52 ESR)
- Internet Explorer 11 ("Compatibility View" is not supported)
- Edge (latest)
- Safari 10
- Safari 11

### PDF Reader:

- Adobe® Reader®

### Mobile Support:

- iOS (two most recent minor versions)
  - Safari (latest)
  - Chrome (latest)
  - Firefox (latest)
- Android
  - Chrome (latest)
  - Firefox (latest)
- Windows (8.1 and 10)
  - Internet Explorer 11 (2 most recent minor versions)
  - Edge (latest)

**For any questions regarding the eDelivery process, please reach out to your MGA.**

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