

PDF Delivery

for policies that are not eligible for North American's eDelivery with DocuSign® process

Depending on how the application was submitted, follow the below processes to allow agents and clients to receive a digital copy of the policy.

Submit eApp application



Agent submits application via eApp and selects the eDelivery option. The client will be required to provide their email address in order to receive a copy of the policy via email.

Submit paper application



Agent submits paper application and includes the eConsent form.



New Business/Policy Change receives the eConsent form and sends a secure email to the client and agent to confirm the client is able to do business electronically.



The client responds to the email by following the instructions included.



When the policy is ready to be issued, New Business/Policy Change securely emails a PDF copy of the policy and any outstanding requirements to the agent, the client and the MGA, along with mailing a hard copy to the agent.



The agent and client collaborate to review, sign, and return any necessary delivery requirements via mail, fax, secure email or secure document upload. All policies that utilize eDelivery will require a delivery receipt in addition to any other applicable delivery requirements. The delivery receipt only needs to be signed by the client when it is sent electronically by the administrative office. All other delivery documents are subject to normal signature requirements.



Once all delivery requirements are received and reviewed, the policy is placed in force and released for commissions.

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