



Signature Centre reference guide

ABSTRACT

The user guide explains about the Signature Centre, a web-based tool.

Introduction

The Signature Centre is a web-based tool accessed through the Sun Life Advisor site that will enable advisors (and Marketing assistants) to view and manage electronic signature (eSignature) packages and attachments (If applicable). An eSignature package is comprised of the document(s) generated through eSignature Form Selection Tool and sent for Client and advisor signatures.

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Getting Started with Signature Centre – what you need to know:

- The Signature Centre displays a dashboard view and a details view. The **Dashboard** provides an overview of all eSignature packages including the status of the package as a whole. The **Details** provides an overview of a specific eSignature package, including the individual status of each signer.
- "Signers" are the individuals (Client(s) & advisor) that need to sign the package.
- Email notifications will only be received when it is time to sign, when the signed documents are ready for download, when an eSignature package is about to expire and when a Client is locked out (for more details see [email notifications](#)). Follow up with Clients when a package is set to expire, or the Client is locked out due to multiple failed log in attempts.
- An eSignature package has seven calendar days for all signers to complete the signing process. The document is available for 60 days after signing is complete before it is automatically removed from the system.

Email notifications

Email notifications will only be received when an eSignature package changes statuses (when it is time to sign, when the signed documents are ready for download, when an eSignature package is about to expire. If Client is Locked Out, the advisor will unlock the package, which sends the Client an email to unlock the package). Notifications have been purposefully limited to the four listed above as to not bombard inboxes as the package changes statuses. Build into your practice a daily check-in with the Signature Centre to monitor and manage eSignature packages.

Email notifications will not be received when a package is expired, has declined signing, opted out or when requested attachments have been uploaded by the Client (see below for more details about each status). It will be important to access the Signature Centre to review package statuses at least once a day because there may be actions that need to be taken.

Dashboard

The Signature Centre Dashboard view provides an overview of all eSignature packages and where they are within the signing process (package status). A paper clip will be shown in the package type column when attachments have been requested. It is important to check for attachments when this appears because there is not a notification that indicates the attachments have been received.

The bolded statuses are clickable and will provide a listing of all the eSignature packages associated with the specific status. (To view the signing status of each signer associated with the package, select the eSignature package by clicking on the Client's name to view the **Details** screen).

eSignature packages can be filtered by their respective status and sort eSignature package listing by clicking on the header (name/package type/date sent/expiry date). A green checkmark to the right of the package status will indicate the advisor has **Actioned** the package (refer to the details section).



Advisor of record: **John Advisor**

All packages 67	In progress 3	Completed 11	Cancelled 2	Expired 51
Locked out 0	Expiring soon 0	Opted out 0	Declined 0	

Name ▼	Package type ▼	# of signees	Date Sent ▼	Expiry date ▼	Package status
Jane Smith	New Account 	2	03 Jan 2019	08 Jan 2019	In progress
Client Inventory	New Account	2	03 Jan 2019	08 Jan 2019	Completed



Signing Status	What it means and Action to take
All packages	<ul style="list-style-type: none"> Displays a list of all eSignature packages.
In progress	<ul style="list-style-type: none"> Displays a list of all eSignature packages awaiting signature (Client or advisor) as well as waiting for requested attachments (if applicable). Click on the eSignature package to display the Details screen and view each signer's status and review and approve attachments (for more details see Details – Signing Status).
Completed	<ul style="list-style-type: none"> Displays a list of all completed eSignature packages. A copy of the completed document(s) is automatically sent to Dealer (Head Office). An email is sent to all signers indicating the signing process is complete and the document(s) is ready for download (or print) by clicking the link in the email. Alternatively, the document is available for download (or print) in the Signature Centre by clicking on the eSignature package to display the Details screen and click View/print. If required, click Download attachments (documents may not be viewable via iPad). All signers have a total of 60 calendar days to download (or print) a copy the document(s).
Expiring soon	<ul style="list-style-type: none"> Displays a list of all eSignature packages that are expiring within 93 hours or less (consider contacting the Client directly). Two days into the package signing, an email notification is automatically sent to all signers who have not signed (including the Advisor). Click on the eSignature package to display the Details screen and view each signer's status (for more details see Details – Signing Status).
Expired (An email notification is not sent for this status)	<ul style="list-style-type: none"> Displays a list of all eSignature packages that did not complete the entire process within the allotted period. eSignature packages expire at 11:59 pm GMT on the seventh calendar day. When the package expires, the entire process ends. Signatures previously provided by other signers, if any, become invalid (for more details see Details – Expired signing status).
Locked out (An email notification is not sent for this status)	<ul style="list-style-type: none"> A signer has exceeded three attempts to enter the passcode provided in the SMS text message. Click on the eSignature package to display the Details screen and view each signer's status (for more details see Details – Locked Out signing status).

<p>Declined (An email notification is not sent for this status)</p>	<ul style="list-style-type: none">• A signer declined to sign the eSignature package.• Click on the eSignature package to display the Details screen to view the reason why they declined (for more details see Details – Declined signing status).
<p>Opted out (An email notification is not sent for this status)</p>	<ul style="list-style-type: none">• A signer opted out of providing consent to use eSignature.• When a signer opts out, the entire signing process ends.• Click on the eSignature package to display the Details screen to view the reason why they opted out (for more details see Details – Opted Out signing status).
<p>Cancelled</p>	<ul style="list-style-type: none">• Displays a list of cancelled eSignature packages.• To cancel a package, click on the package to display the Details screen and click Cancel Package. Packages cannot be cancelled if a signer has already signed the documents.

Details

When an eSignature package is selected (click on Client name) from the **Dashboard** view, it will display the **Details** screen. The **Details** view provides an overview of a specific eSignature package, including the individual signing status of each signer. This view provides you with the signer **Name**, **Role**, **Mobile number** (editable), **Email address** (editable for Client), **Signing status** and **Actions** to take, when applicable. It also provides the **Package type**, **Expiry date**, **Package status**, and **Account/contract number** applicable to the package.

The **View/print** and **Download attachments** are available in this view (only when the signing is complete at which point the advisor will click the **Actioned** check box to indicate they have completed the download including attachments to salesforce) as well as **Cancel package** (only when no one has signed).

Signing Status	Meaning and Action to take																										
Not signed	<p>The Signer has not yet signed the package.</p> <div data-bbox="500 869 1393 1199"> <p>Details <input type="checkbox"/> Actioned ⓘ</p> <table border="1"> <thead> <tr> <th>Package type</th> <th>Expiry date</th> <th>Package status</th> <th>Account/contract number</th> </tr> </thead> <tbody> <tr> <td>New Account</td> <td>08 Jan 2019</td> <td>In progress</td> <td>AAF1328-5</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Name</th> <th>Role</th> <th>Mobile number</th> <th>Email address</th> <th>Signing status</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Jane Smith</td> <td>Owner</td> <td>519-555-5555 </td> <td>janesmith@yahoo.com </td> <td>Not signed</td> <td> Resend email</td> </tr> <tr> <td>John Advisor</td> <td>Advisor</td> <td>--</td> <td>masked.data@sunlife.com</td> <td>Not signed</td> <td> Resend email</td> </tr> </tbody> </table> <p style="text-align: right;"> <input type="button" value="Cancel Package"/> <input type="button" value="Review attachments"/> <input type="button" value="Complete package"/> </p> </div>	Package type	Expiry date	Package status	Account/contract number	New Account	08 Jan 2019	In progress	AAF1328-5	Name	Role	Mobile number	Email address	Signing status	Actions	Jane Smith	Owner	519-555-5555	janesmith@yahoo.com	Not signed	Resend email	John Advisor	Advisor	--	masked.data@sunlife.com	Not signed	Resend email
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<p>Locked out (An email notification is not sent for this status)</p>	<ul style="list-style-type: none"> A signer has exceeded three attempts to enter the passcode provided in the SMS text message. To unlock a signer, click unlock (Successfully unlocked message will appear). An email is automatically sent to the signer for signing or downloading the package. This will not affect other signers. <div data-bbox="422 504 1510 882" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Details</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Package type</th> <th>Expiry date</th> <th>Package status</th> <th>Account/contract number</th> </tr> </thead> <tbody> <tr> <td>KYC</td> <td>23 Jul 2018</td> <td>Locked out</td> <td>L123456-7</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Role</th> <th>Mobile number</th> <th>Email address</th> <th>Signing status</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Chris Client</td> <td>Owner</td> <td>555-555-2222 </td> <td>chrismclient@email.com </td> <td>Locked out</td> <td> Unlock</td> </tr> <tr> <td>Jaime Advisor, B. Comm, CFP</td> <td>Advisor</td> <td>555-555-0101 </td> <td>jaime.advisor@sunlife.com </td> <td>Not signed</td> <td> Resend email</td> </tr> </tbody> </table> </div>	Package type	Expiry date	Package status	Account/contract number	KYC	23 Jul 2018	Locked out	L123456-7	Name	Role	Mobile number	Email address	Signing status	Actions	Chris Client	Owner	555-555-2222	chrismclient@email.com	Locked out	Unlock	Jaime Advisor, B. Comm, CFP	Advisor	555-555-0101	jaime.advisor@sunlife.com	Not signed	Resend email
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Signing Status	Meaning and Action to take
<p>Opted out (An email notification is not sent for this status)</p>	<ul style="list-style-type: none"> • A signer opted out of providing consent to use eSignature. • To display the signer's reason, click Opted out. When there are two Client signers, the reason will only display for the signer who opted out of electronic consent. • When a signer opts out, the entire eSignature process ends. Signatures previously provided by other signers, if any, will become invalid. To obtain signatures determine the signing method: <ul style="list-style-type: none"> ○ Wet signature: Click View/print to print document and obtain the Client(s) signature. ○ eSignature: Return to the SV i-App, if required make changes, and click Prepare Documents Package to send for eSign.
<p>Expired</p>	<ul style="list-style-type: none"> • When the package expires, the entire process ends. • To obtain signatures determine the signing method: <ul style="list-style-type: none"> ○ Wet signature: Click View/print to print document and obtain the Client(s) signature. ○ eSignature: Return to the eSignature Form Selection Tool and click Prepare Documents Package to send for eSign.

How to...

Questions	Action to take
<p>How to change a signer's email address?</p>	<p>This can only be completed for Client(s).</p> <ul style="list-style-type: none"> • Locate the eSignature package on the Dashboard (sort by name) and click to display the Details screen. • Next to the signer's Email, click the pencil icon, enter new email, and click Done. An email is automatically sent to the new email address (this will not affect other signers). • Each signer must have a unique email address.
<p>How to change a signer's mobile phone number?</p>	<p>This can be completed for the Client(s).</p> <ul style="list-style-type: none"> • Locate the eSignature package on the Dashboard (sort by name) and click to display the Details screen. • Next to the signer's Mobile phone, click the pencil icon, enter new mobile number, and click Done. An email is automatically sent to the signer (this will not affect other signers). When the signer clicks on the hyperlink in the email, a passcode will be sent to the updated mobile phone number. • Each signer must have a unique mobile number.
<p>How to resend the email to a signer?</p>	<p>This can be completed for the Client(s) and/or advisor.</p> <ul style="list-style-type: none"> • Locate the eSignature package on the Dashboard (sort by name) and click to display the Details screen. • Locate the signer and click Resend email. This will not affect other signers.
<p>How to resend the passcode to a signer?</p>	<p>This can be completed for the Client(s).</p> <ul style="list-style-type: none"> • Locate the eSignature package on the Dashboard (sort by name) and click to display the Details screen. • Locate the signer and click Resend email. When the signer clicks on the hyperlink in the email, a passcode will be sent to their mobile phone. This will not affect other signers.
<p>How to download or view a completed signed document?</p>	<ul style="list-style-type: none"> • Locate the eSignature package on the Dashboard (sort by name) and click to display the Details screen. • Click View/print to display a PDF of the Client(s) and advisor signed document (may not be viewable on iPad).

Question	Action to take
How to cancel (or stop) an eSignature Package?	<p>This can only be completed if no one has signed.</p> <ul style="list-style-type: none">• Locate the eSignature package on the Dashboard (sort by name) and click to display the Details screen.• Click Cancel package.
How to know if a Client's email has bounced back (error with Client email)?	<ul style="list-style-type: none">• Dealer head office will send an email notification through Service Now to the Advisor of Record when a Client's email has bounced back. Follow the instructions in the email.

Where to go for help

- **IFO Client Services**
For general inquires related to eSigning GIFs applications/forms or require functional support, call IFO Client Services at 1-844-753-4437
- **Advisor Technology Support (ATS)**
For technical support, call Advisor Technology Support (ATS) at 1-800-800-4786 path 6, 1 (English & French)



Life's brighter under the sun

