

Sun eApp eSign Process

1. When you are ready to send the application to the client for signature, click on the **Open** button.
2. Next, you will be asked to verify sign or details. Once you have verified the email and password:
 - a. If the client is with you, select **In-person**.
 - b. If the client is remote and this is a non face to face application, select **Remote**.

3. Then click **Send package**.

4. You will now see the status changed to "In progress."

John Smith Signature process pending

Policy number: AA36,216-1

Files

- Application - AA36,216-1
- Evidence for B Smith - AA36,216-1

Items to complete	Status	
eSign	<input type="radio"/> Not complete	Open
Advisor's report	<input type="radio"/> Not complete	Open
Advisor's declaration and notice of disclosure	<input checked="" type="checkbox"/> Complete eSign and Advisor's report	Declare and submit

Testing Client (Owner, Insured)

eSignature type

In-person Remote

Delivery method for fully signed package

Email and passcode Email and security question.

Email Address

test@sunlife.com

Mobile number

+1 999-999-9999

Note: if you have more than one client that needs to sign, they must have a unique mobile phone number and email address.

Any changes to contact information will not be saved after the package is signed.

Previous **Send package**

John Smith Signature process pending

Policy number: AA36,216-1

Files

- Application - AA36,216-1
- Evidence for B Smith - AA36,216-1

Items to complete	Status		
eSign	<input checked="" type="radio"/> In progress	Open	Manage eSign
Advisor's report	<input type="radio"/> Not complete	Open	
Advisor's declaration and notice of disclosure	<input checked="" type="checkbox"/> Complete eSign and Advisor's report	Declare and submit	

5. The client will receive an email asking them to eSign. Once they click on the **Sign my documents** button in the email, they'll receive a text message with a passcode on their phone.

6. After the client receives the passcode, they will click **Login**.

7. The client will need to review the consent and click **Accept** to sign the application.

8. They can now click the **arrow tab** and go directly to the Sign in section or scroll down to verify all the details.

EXAMPLE:

Hello Testing Client

The New SunTerm Life Policy package is ready for your signature. Select 'Sign My Documents' once you are ready to continue.

A passcode will be sent to your mobile phone when you select the button. Use this passcode to access your documents. If you have any questions, please contact your advisor, Sheldon Rice, at (800) 555-1851. They are here to help.

SIGN MY DOCUMENTS

Sincerely,
The team at Sun Life

Please do not reply to this email. This inbox is not monitored.

Guest Login

Please use the passcode sent to your mobile phone for secure access to your eSignature package.

SMS Passcode

Login

Electronic Disclosures and Signatures Consent

Must be accepted and agreed to before starting the signing process.

Consent

Not accepted

This is a consent Document. You must read it and click the Accept button at the end of the Document.

Consent to use electronic signatures

By clicking "Accept" you agree to the use of electronic signatures, and you agree that your electronic signature will have the same legal effect as your signature on a paper document.

Opt Out

Accept

New SunTerm Life Policy

Opt Out

Decline

Confirm

My signatures 0 / 1

Please review and sign this Document by scrolling and clicking on the "Click to Sign" or "Click to Initial" boxes.



Electronic declaration and authorization for insurance application

Advisor name: Sheldon Rice
Advisor code: 017491
Policy number: AAO0,246-2
Application date: December 23, 2020

Client details

Testing Client

Involvement

Owner, Insured

Personal information

Date of birth: January 1, 1980
Male

Province of residence

Ontario

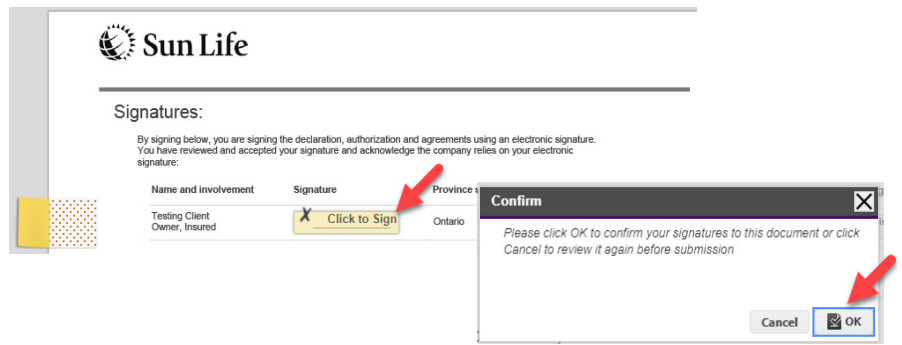
Product details

Testing Client

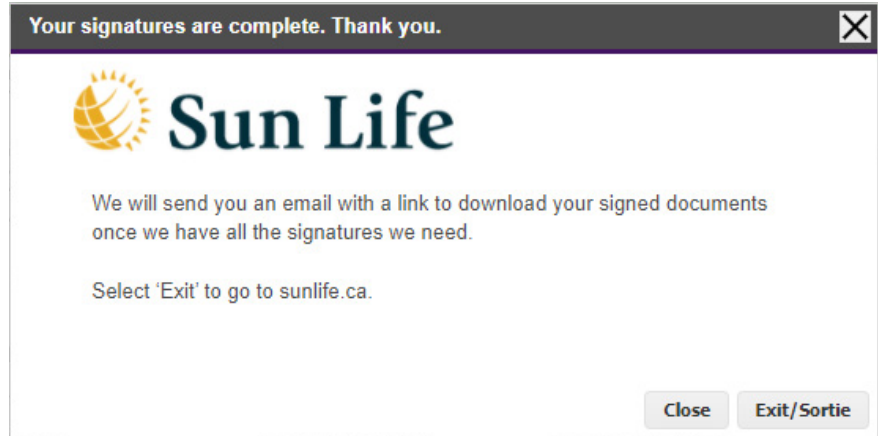
Product SunTerm \$500,000
Coverage Term 20 term



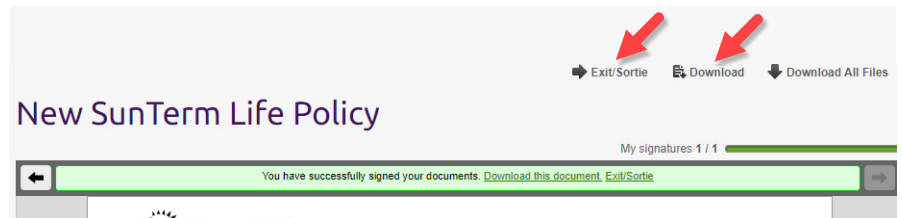
9. Once they are at the signature section, they will need to click on **Click to Sign**.



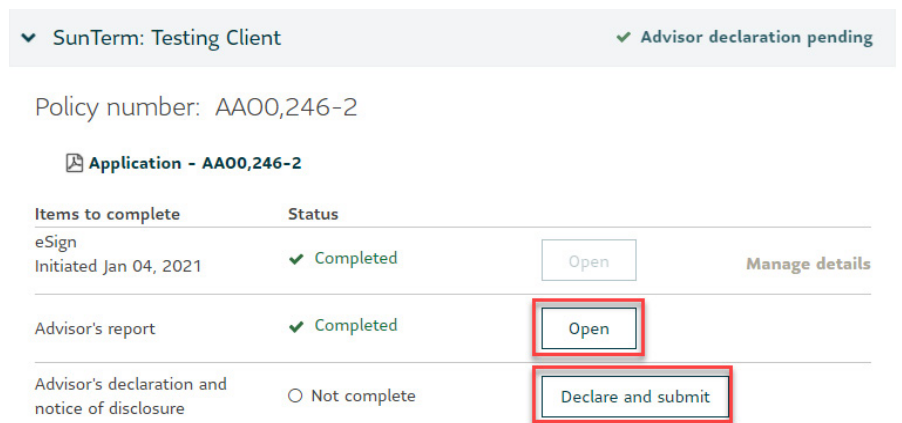
10. They have now signed the application and can click **Exit**.



11. On the next screen, they can click **Download** to receive a copy of their signed application.



12. If you still have the application open in Sun eApp and used Remote signing, you will need to close and re-open the application to see the updated status. Otherwise, you will now see the eSign status change to completed. Now you can complete the Advisor's report and Advisor declaration to submit the application.



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