

## Policy eDelivery via DocuSign Frequently Asked Questions 10/27/2021

<b>What is my access code?</b>	Your DocuSign access code will always be the last four digits of your SSN and your DOB (MMDDYYYY). Example: SSN = <b>1234</b> + DOB = <b>Jan 15<sup>th</sup>, 1985</b> would be <b>123401151985</b>
<b>What is my Client's access code?</b>	The Client's DocuSign access code will be the last four digits of their SSN and their DOB (MMDDYYYY). Example: SSN = <b>1234</b> + DOB = <b>Jan 15<sup>th</sup>, 1985</b> would be <b>123401151985</b>
<b>What if the DocuSign document is locked-out?</b>	Access to the document will be locked after three unsuccessful attempts with the access code. If this occurs, contact National Life to unlock and verify access code. Note, it is a good practice to consult your client proactively to assist with access and eDelivery instruction.
<b>What if a change is required on the policy?</b>	If you find that a change is required to the policy, Decline the DocuSign policy and select the reason that a change is required. The National Life rewrites team will be in touch to address the change. It may be helpful to notify your case manager with instructions.
<b>What information is required for eDelivery?</b>	Obtaining a valid email address is important to ensure your client receives eDelivery notifications. You can view delivery status on the Agent Portal.
<b>Why do I keep receiving reminders?</b>	Reminders will be sent to the current signature party every 3 days after the policy is sent via DocuSign. This indicates the eDelivery is still pending and has not been completed or declined.
<b>How can I check status?</b>	You can view policy delivery status any time in the National Life Agent Portal and Mobile App. Status will indicate if the document has been opened, signed or if access or delivery was unsuccessful. You can also sign-up to receive SMS notifications for eDelivery updates.
<b>How will I know if my client has completed their signatures?</b>	You will receive an email notification when your client has completed eDelivery. You can also view policy delivery status on the Agent Portal and Mobile App.
<b>Will I receive a copy of the completed, signed policy packet?</b>	Yes, all recipients will receive a completed copy of the documents via a DocuSign email. Documents can be downloaded and saved from DocuSign and are also available on the Agent and Client portals.
<b>Where can I find a copy of the policy?</b>	The policy PDF is available in the Agent Portal or Mobile App and can be printed at any time. It is also available in the Client Portal and App. Additionally, all documents can be downloaded or printed from DocuSign.
<b>What is a Policy Promise?</b>	The Policy Promise is unique to National Life and exclusive to eDelivery. This keepsake document lists key details of the policy including agent contact information and living benefits. The document is packaged in a custom folder and can be ordered online up to 90-days after issue and can be sent to your or mailed directly to your client.
<b>How do I request a Policy Promise?</b>	Available on eDelivery only, the Policy Promise can be downloaded or ordered on the Agent Portal or Mobile App. Access the New Business Policy Details and click actions to view or order the Policy Promise. The Policy Promise is available at no cost to you. You can view a sample before ordering the Policy Promise and you can download the Policy Promise any time.

<b>When is the Policy Promise sent?</b>	<p>If sent to you, the Policy Promise will be mailed in 7-10 days or you can download and print the document yourself from the Portal.</p> <p>If sent to your client, the Policy Promise will be mailed 7-10 days AFTER eDelivery is completed and all required forms are satisfied. This is to avoid any confusion of an incomplete eDelivery.</p>
<b>Is the Policy Promise available in other languages?</b>	Currently, the Policy Promise is only available in English.
<b>Why was a Physical policy mailed?</b>	In the event eDelivery notifications are undeliverable or the eDelivery is not completed timely, a physical policy may be mailed.
<b>Can my client decline in DocuSign?</b>	Yes, decline options are available to all recipients. In the event your client declines eDelivery you will be notified, and a physical policy may be mailed. Note, declining in DocuSign is a rejection of the eDelivery method and does not decline the policy coverage.
<b>Do DocuSign links expire?</b>	Yes, the DocuSign link will expire after 90 days after the send date. If the link is expired or cannot be accessed, contact National Life for help.
<b>In what cases is eDelivery unavailable?</b>	There are some conditions that cannot currently be supported via eDelivery. These include missing or invalid contact details or policies for corporations, trusts, pensions, group policies and some foreign nationals.
<b>What if my client doesn't want eDelivery?</b>	<p>If your client prefers physical policy delivery, decline the eDelivery in DocuSign and select the preference to receive a mailed policy.</p> <p>If you know this information ahead of policy issue, notify your Case Manager to request a physical policy at issue.</p>