DocuSign guidelines and best practices

At John Hancock, we want to make it as easy as possible to do business with us. To help streamline the process, **New Business will accept DocuSign eSignatures** on applications, replacements and other forms, as well as delivery documents. Please review the following best practices for taking advantage of DocuSign at John Hancock.

Please note that some companies do not accept eSignatures, so in some situations, we may need to request a wet signature when finalizing documents. **As a reminder, External 1035 Exchange forms should always be wet signed.**

DocuSign approval process

To take advantage of DocuSign on life insurance applications, replacements and other forms, as well as delivery documents, the submitting firm must:

- have a direct selling agreement with John Hancock; and
- must complete our 1- page Due Diligence Checklist and 10-page Electronic Signature Agreement. **Please contact *OMC@jhancock.com* to obtain this paperwork.**

For questions regarding setting up a DocuSign account, please visit the DocuSign website or call 1 (877) 720-2040, 24 hours a day Monday through Friday and 5:00 AM to 5:00 PM Saturdays and Sundays.

Document acceptance process

- The entire package must be sent to the client for signature, not just the signature page. This allows us to verify the client has seen the entire package
- A tracking ID must be visible on ALL pages
- Use **send an envelope** *not* **sign a document** when setting up your case
- Use one envelope for all signers: insured, owner and agent. This enables sequential signing and a proper tracking ID. Instructions for setting up an envelope are provided on the following page
- The owner's signature and signature date must be the same across the application and any applicable replacement forms. This ensures smooth processing through replacements
- A **Certificate of Completion** must accompany all DocuSigned submissions

How to set up a DocuSign envelope

Once an application and/or applicable forms and requirements are ready to be signed, complete the following steps to collect the necessary signatures.

- Log in to your **DocuSign account**
- Select **send an envelope** from the start menu
- Under **add documents to the envelope,** upload all complete source documents. This may include multiple documents requiring signatures, including but not limited to, the application, Tax ID form, Agent Report and information addenda not requiring signatures
- Under **add recipients:**
  - Click **add recipient** until there are the correct number of signers
  - Select **customize** and **add access code** to assign an access code to each signer. You will need to add a separate code for each signer
  - Input the full name and email for each recipient
  - If necessary, check the **signing order** box
    a. If **set signing order** is checked, a new field will appear to the left of each recipient where the signing order can be numbered
    b. If **set signing order** is not checked, all recipients will receive the document at the same time and can sign in any order
- After setting the signing order, click the **signing order** button above right to view a diagram
- It is possible to create hybrid signing orders that blend concurrent and sequential options
- An option to edit the subject and message for the notification email is under **message to all recipients**
- Click **Next** to move to the **add fields interface**
- Add signature and date fields to the document(s):
  - Select the first signer from the drop-down menu at the top left of the interface *(note — signers and fields are color-coded).*
  - For each location in the source document(s) where a signature is required, drag the **signature** object from the left and pan to the appropriate place in the document
  - Where you see required/preferred, drag the **date signed** object to the appropriate place in the document
  - **Note:** even if the **date signed** field is not added to the document, the sign dates for all signers will be tracked in the envelope metadata
- Once all signature and date fields have been added, click **send**

For more information

Please contact the Operations Management Consultant team at **OMC@jhancock.com.**

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