



eSignature Guide

Helping You Grow Your Business

Avoid Delays & Save Time

Welcome to Innovative Underwriters eSignature platform, providing flexibility for you to obtain client signatures electronically.

The forms available for eSignature through Innovative Underwriters are:

- [Informal Inquiries](#)
- [HIPAA](#)
- [Reg 194 Disclosure](#)

We recommend clicking each form above and saving a copy to your documents on your computer for quick and easy access.

An electronic consent form will be included automatically for each eSignature case.

California cases require an additional consent form. A pre-made template is available within the eSignature platform for your convenience. Please reference pages 2 & 3 for additional steps.

Carriers Accepting IU eSignature Documents:

The following carriers are accepting applications with IU forms signed electronically. Additional carriers will be added when available and we will keep you up to date with the most current details.

- John Hancock
- Principal
- Protective

Access eSignature

Access the eSignature platform from the Innovative Underwriters website via this link <https://innovativeunderwriters.com/forms/> and enter your GOL login credentials. The following pages offer a tutorial for using the platform.

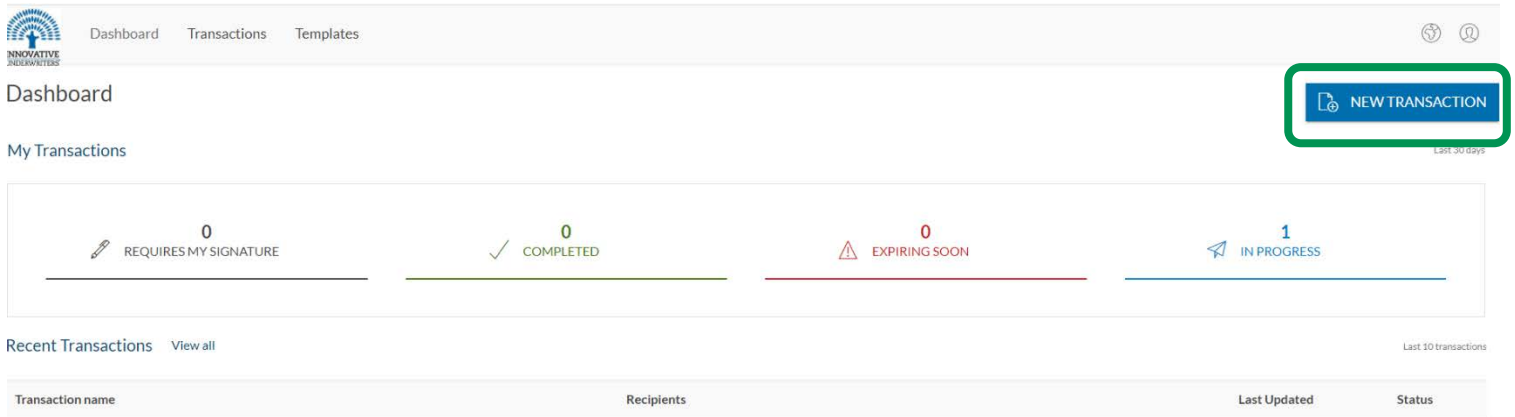
Once a transaction has been sent to a client, it will remain in your system for the default 7 days. If you wish to make the default longer, you may do so in the settings option. **Please do not shorten** as some carriers require transactions be made available for a minimum of 7 days.

Questions

If you have questions regarding eSignature, or other [IU eServices](#), please contact Kim or Angie.
Kim Wilcox | Kwilcox@innovativeunderwriters.com | 215-875-8681

Angie DeFazio | ADeFazio@InnovativeUnderwriters.com | 215-875-8778

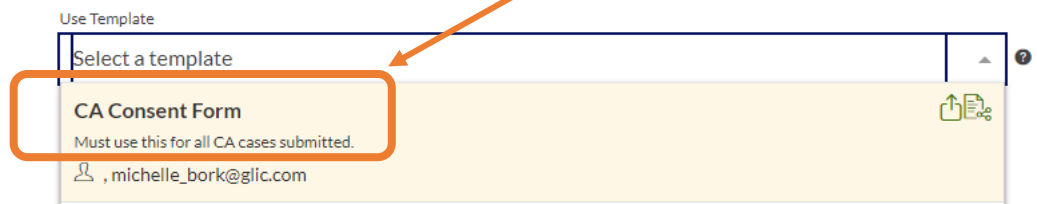
Your IU e-Signature Dashboard will appear upon login. Click **NEW TRANSACTION**



Enter client name in the transaction name field and click **CREATE**.

The 'Create New Transaction' form contains the following fields and options: 'Name*' (with 'Client Name' entered and highlighted by a green box), 'Description', 'Message to all recipients (optional)', 'Use Template' (dropdown menu with 'Select a template' selected), 'SETTINGS' section including 'Language' (English), 'Timezone' ((GMT 0:00) GMT), 'Review before completion' (toggle), and 'Enable screen-reader accessibility' (toggle), and 'Expiration' section with 'Type' and 'Day(s)' (7).

California cases must select the additional required consent form from the **TEMPLATES** section

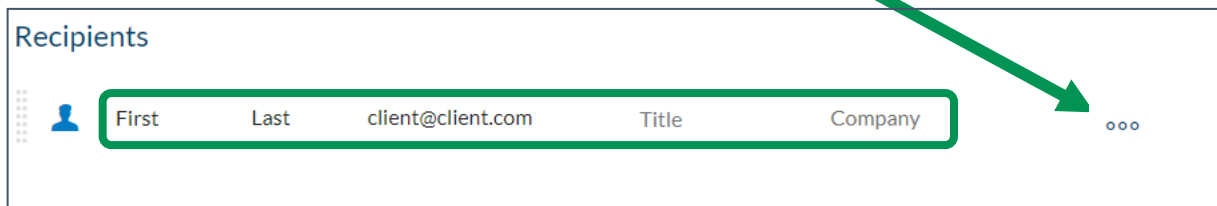


Click **ADD DOCUMENT** and select pre-saved form from your computer; click **OPEN**

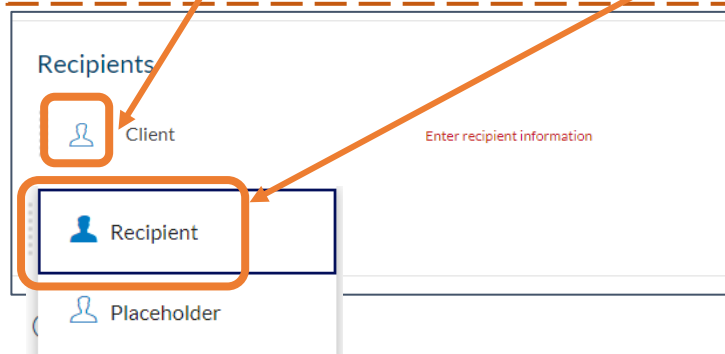


The Electronic Disclosures and Signatures consent form is required and will automatically populate for each transaction.

Enter client's **FIRST NAME, LAST NAME,** and **EMAIL** address. Title and company fields are optional. To remove a recipient, right click on the 3 dots located on the far right and click REMOVE



California cases will have a pre-default client that will need to be changed to recipient. Click on the **human icon** to the left of "client" and click "**recipient**". First, last, & email fields will populate.



All cases require authentication. Click on the **...** to the far right and click **SETTINGS**.



Click **AUTHENTICATION**, and then click the circle for SMS. Enter the clients cell phone number. This is used to send a verification code for them to access the e-Signature document. Click **SAVE**.

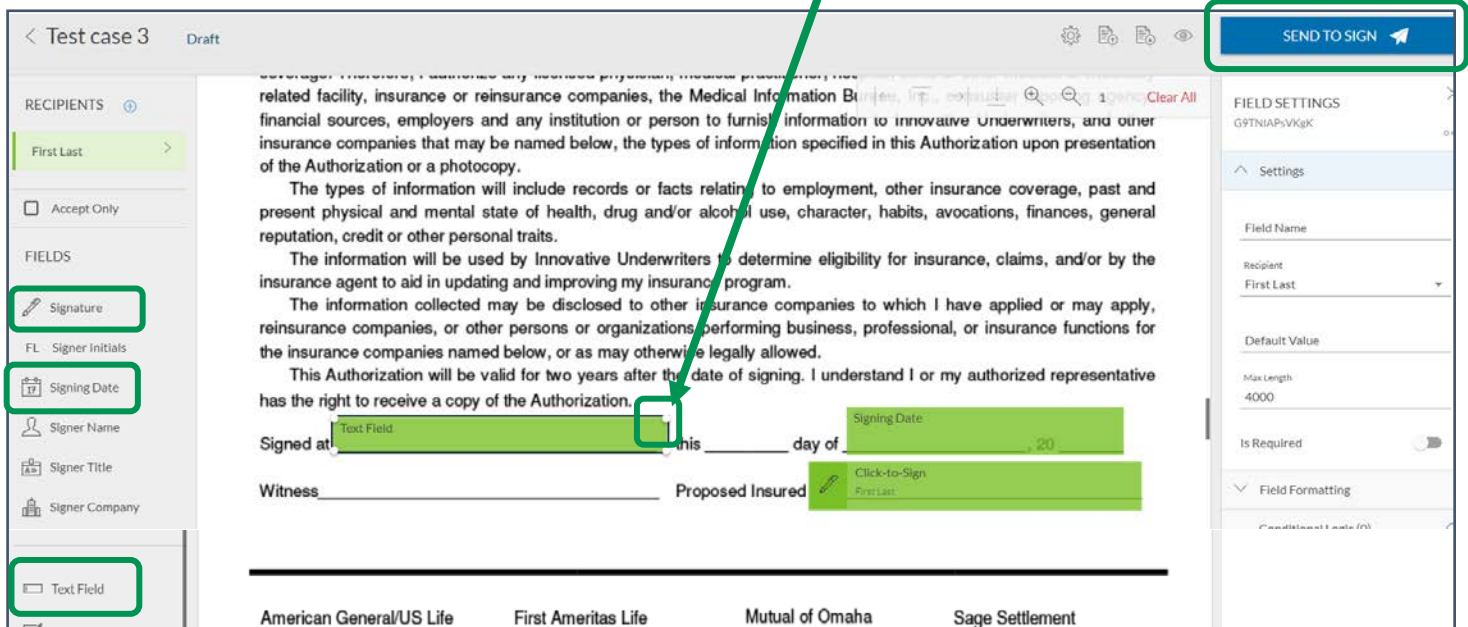
The screenshot shows a 'Transaction Test' configuration window. On the left, a sidebar menu has 'Authentication' selected. The main area is titled 'Authentication Method for Transaction Test'. It features a 'Type' dropdown set to 'General' and a message: 'Please select the authentication method for verifying the recipient's identity.' Below this, the 'SMS' radio button is selected. A text field for 'Mobile phone number' contains '(201) 555-5555' with a US flag icon. A 'SAVE' button is highlighted in the bottom right corner.

Click the **NEXT** button on the top right

The screenshot shows a document review interface for 'Test case 3' in 'Draft' status. The top navigation bar includes 'Dashboard', 'Transactions', and 'Templates'. A 'NEXT >' button is highlighted in the top right corner. Below the document title, there is a 'Documents' section with a file named 'Electronic Disclosures and Signatures Consent'. A dashed box indicates a 'Drag & drop files to upload' area, and an 'ADD DOCUMENT' button is at the bottom left.

Scroll through document until you reach fields requiring signature.

Click **SIGNATURE** and when green click-to-sign box appears, drag to corresponding signature line on page. Repeat with **SIGNING DATE** and **TEXT FIELDS** where needed. You can adjust the fields by clicking the white corner circles and dragging.



Click **SEND TO SIGN** in the upper right-hand corner when you're ready to send the document/s to your client.

Your client will receive an email notification from Innovative Underwriters e-Sign with the subject line: **Action Required: Your Innovative Underwriters Document is Ready for Review and Signature**

Once they **click to access**, they will be prompted to **enter their cell phone number** you provided for authentication **to verify their identity**.

A **6-digit code** will be sent to them via text, which they'll enter and then click login. They will need to click/tap **ACCEPT** for the electronic disclosure.

Once they sign and submit, it will automatically be delivered to IUNewbusiness@innovativeunderwriters.com along with a notification to you.