# Signature Process Overview

This document is designed to help you understand the Signature Process for an AMsuite Policy.

- E-Signature Process

- Traditional Signature Process

## Key Benefits

AMsuite is American Modern's state-of-the-art software solution. It consolidates the policy administration, claims and data applications into one platform for all Personal Lines products.

From motorcycles to manufactured homes, users will benefit from the same functionality, flow and flexible navigation. In a nut shell, AMsuite will make it easier for you to do what you do best—serve customers.

## Electronic Signature Process

**1**
If the customer wants electronic signature, select Electronic Signature- Mobile Device Required from the Payments & Signatures page.

The fields for electronic signature populate with information from the customer's account.

**2**
Select Yes for "Consent to electronic delivery of required signature forms?"

If you select "No" or do not answer this question, the submission will not bind.

Confirm that both the "Primary Named Insured email address" and "Mobile phone number for text message delivery of Personal Identification Number (PIN)" are correct.

You cannot choose electronic signature if the customer does not have a mobile phone number.

- Both of these fields pre-fill.

- You cannot choose electronic signature if the customer does not have a mobile

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phone number.

Click Next.

**4**    Click **Issue Policy** from the **Bind Options** menu at the top of the page.

**5**    Click **OK** when asked "Are you sure you want to bind and issue this policy? If applicant has provided Credit Card and/or EFT payment information, by selecting **OK** insurer is authorized to process payment."

The **Submission Bound** page opens.

**6**    Your submission is bound. With e-sign, the opportunity for the producer or customer to sign expires after a certain period of time.

**7**    Once the producer e-signs the new business application, the customer will receive an e-mail with instructions for e-Signature. The customer clicks **Review Document** to begin the e-Signature validation process.

- If an producer needs to sign an application, Docusign sends a daily e-mail reminder if the agent does not sign the first or second day.

- If the producer does not sign by the third day, you will receive an activity to follow up on the required signature forms.

- A customer (insured) has 14 days, with a reminder after seven days, and then three days before the expiration.

**8**    The customer enters the primary named insured's four-digit year of birth as the Access Code and clicks **Validate**.

**9**    The customer validates the mobile phone number that is displayed, and clicks **Send Text**.

A PIN, Personal Identification Number, is an authentication code that is sent by text to the customer's mobile phone.

The customer receives a text with the PIN, or authentication code to enter into DocuSign.

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**10**  The customer enters the PIN/ Authentication code received via mobile phone text and clicks **Confirm Code**.

**11**  The customer has now been validated.  The customer reviews the forms, selects the option to sign and clicks **Continue**.

- If the customer does not select the option to sign, they receive an email reminder on the 11th and 14th day as a reminder to sign. The customer has 14 days to sign before an activity is sent to you to follow up on required signature forms.

-  If the customer declines to sign,  an activity is sent to you to follow up on the required signature forms.

- If the customer decides to traditionally sign the forms, upload the signed forms to AMsuite Policy and close the activity (do not upload forms with NPPI.)

> *Non-Public Personal Information (NPPI) is any data or information considered to be personal in nature and not subject to public availability.*

- If the customer does not decide to traditionally sign the forms, resubmit the request to sign forms from the **Documents** page.

**12**  The customer signs the forms.

- If the customer does not complete the e-Signature process, an activity is sent to you to follow up on required signature forms.

**13**  The customer is provided with a default signature, and can click **Change Style** to change the style of the signature. Customer can click to select another signature style.

- Customer clicks **Adopt and Sign** to continue with the e-Signature process with the signature that was selected.

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**14**

Customer clicks **Finish** to complete the signature process.

Verification dialog is displayed.  The customer clicks **Continue**.

A copy of the document is sent to the customer's e-mail address.  Docusign automatically uploads the signed forms to AMsuite Policy.

Customer Service reviews the forms and manually closes the activity if no underwriting review is needed.

- If the forms need underwriting approval,  customer service sends an activity to underwriting to review the EFT forms and close the activity.

## Traditional Signature

**1**

If the customer wants to traditionally sign the required forms, select **Traditional Signature** from the **Payments & Signatures** page.

**2**

Click **Issue Policy** from the **Bind Options** menu at the top of the page.

**3**

Click **OK** when asked  "Are you sure you want to bind and issue this policy? If applicant has provided Credit Card and/or EFT payment information, by selecting OK insurer is authorized to process payment."

The **Submission Bound** page opens. Your submission is bound.

Click **View your policy.**

**4**

Click **Payments & Signatures** from the **Sidebar** menu.

**5**

At the bottom of the page, select the checkbox next to the form that needs signed.

**6**

Click **View/Print**.

**7**    Click **Open**.

The form opens.

**8**    Print the form(s) and mail to the customer, or if the customer is in your office, have the customer review and sign it.

You are required to obtain the signed form(s) from the named insured. Once obtained, review for accuracy and make any necessary changes to the policy. An activity is created to remind you to follow up on the required traditional signature documents.

**9**    When the customer sends you the signed forms, review and then upload the signed forms to AMsuite Policy and close the activity.

You should not upload forms with NPPI.

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If the customer does not sign the forms, follow up with them to obtain the signed forms.

**10**    f you have uploaded the signed forms, close the Activity. To do this, go to the **My Activities** page and click the subject of the activity to review the details.

To complete a self-generated reminder, use the same steps as you would to complete a notification activity.

The Activity window appears.

You can put a note on the policy via this activity before completing.

To mark an activity as complete, click **Complete** in the workspace window.

For questions, contact American Modern's Customer Service Team @ 1-800-543-2644.