AssureSign Process Steps

Pre-AssureSign Login Steps

1. Complete ALL appropriate form(s):
- Electronically with fillable PDF (Download via Agent Resources)
- Complete by hand

2. Upload completed form as PDF
- Save document(s) on computer
- Scan document(s) and upload as a PDF

AssureSign Steps

1. Setup AssureSign completion details
1. Login into AssureSign
2. Request a "Send Envelope"
3. Upload Documents (application, etc. for client) –upload in the order you want them signed
    1. **BetterLife E-Sign Agreement** (Available via Agent Resources) *
    2. **Privacy Policy** (Available via Agent Resources) *
    3. **ALL PDFs** from Pre-AssureSign Login Step 2

       ***must be include with each "envelope" sent**
4. Choose "Add Signer(s)" information (name & email address)
    1. Add applicant(s), owner(s), etc.
    2. ADD yourself (as Agent) as a signer so you can sign the applicable field(s) you need to sign
5. Use **JotBlocks** to complete all appropriate signature(s), time stamp, etc.

   Note – Per BetterLife electronic signature rules, **only use** the **Time Stamp** JotBlock: do NOT use the "Date" JotBlock.

2. Send AssureSign documents for signature
- Choose "Review and Send"
- **Add Client name to "Order Number" field**
- Send document(s) to the client

3. Receive update communications
- 1st communications will indicate documents were sent out for signature
- Final communication will indicate all signing has been completed

Completion Steps

Send Completed documents to BetterLife Home Office for processing
- Choose "View Document" from the last communication to view completed documents.
- Save finished document to your computer (including Agent Report if applicable)
- Send completed documents (as attachments):
    - NewBusiness@betterlifeins.com For all NEW BUSINESS forms
    - MemberService@betterlifeins.com For ALL service forms