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Telephone Signature Quick Start

Overview

Guiding Principles:

- ✓ Only the applicant may sign by telephone; the agent must use Sign Now
- ✓ The applicant must receive and review all application forms before starting the telephone signature process (call).
- ✓ All responses on the telephone signature call must be made by the Applicant.
  - The agent may not contribute in any way once the call begins

Requirements for telephone signature:

- ✓ One applicant
- ✓ No Power of Attorney
- ✓ Initial and subsequent premiums paid by ACH
- ✓ The applicant is also the bank account holder

Using the Interactive Voice Response (IVR):

- ✓ The telephone signature call usually lasts about 5 minutes
- ✓ A series of pre-recorded statements will be presented to the applicant
- ✓ The applicant must enter information to identify their application
- ✓ The numbers on the phone keypad are used to enter a response
  - * to repeat the statement
  - 1 to consent or respond in the affirmative
  - 7 to decline

Video Tutorial

Click Here to watch the Tele-Sign Demo

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FireLight e-App with Client Telephone Signature

1. *Data Entry*

✓ Select 'Yes' to "Does the applicant intend to sign this application using the telephone signature option?"

✓ Enter a 4-digit numeric PIN created by the applicant

2. *Signatures*

✓ Complete your Agent signature using the "Sign Now" method

✓ List of Required Signers page: Click on the Insured and the Payor buttons, then Proceed

✓ Client Signature Choice page: Choose Tele-Sign

✓ Signer Information page:
- Enter the Applicant's Name
- Enter the City and State where the applicant will be located during the telephone signature call
- Add client's email, birthday and last 4 digits of SSN if applicant wants a copy of signed application after it's submitted (optional).

✓ Form Access page:
- Indicate the means by which you would like to deliver the application forms for the client's review.
  - *You must deliver to and review the forms with the applicant before the telephone signature begins.*

✓ Agent Instructions page:
- Read this page to ensure your applicant is prepared for the call.
- Ensure the client has received and reviewed their application, there are no outstanding questions and they are ready to sign by telephone
- Provide information to the Applicant to validate their application and identity:
  - *e-App ID*
  - *The PIN they selected during data entry*
  - *Their date of birth, represented as an eight-digit number*
- You may connect the caller to the Interactive Voice Response phone number, but **you may not participate in the call**. All responses must be made by the Applicant throughout the call.
  - *The toll-free phone number is listed for your reference*

3. *Finalize*

✓ Once you and your client have completed your signatures, the application will be automatically submitted

✓ To confirm submission:
- Use Recent Activity or Manage > All Activities, or
- Review the email generated upon submission