

E-APP Quick Start Guide

- Agent logs into the producer portal: www.sslco.com/agents.aspx
- Agent selects the iGo icon
- Select "Start New Case" or "View My Cases"
- Fill out the application accordingly (make sure all pages have green check mark)
- Validate and lock the completed application
- Select a signature method

Before you begin, please note:

- 1 - All parties must view the Terms of Use and completed application before proceeding
- 2 - Client must verify that everything on the application is true by clicking on the check box. Once application has been reviewed, go to the next screen to enter the Signed City and State
- 3 - Credit Card information will be collected if that is the payment method, otherwise, agent and/or client will select APPLY eSignature(s) and submit the application
- 4 - Once all signatures have been collected and the application has been submitted, you will see the following message at the bottom of your screen:

Thank you for submitting your Electronic Application

Call 800-737-6972 to complete the telephone interview and the voice signature for the Proposed Insured, if applicable.

Please wait three minutes before calling Apptical to complete the Personal History Interview.

Available Signature Methods

Option 1: Print and Wet Sign with E-Submit

- E-Submit Application
- Print and have all parties sign application and **call Apptical to complete POS interview** (NewVantage_Eapp_Paper) if sitting in front of client in your office
- Mail or fax signature pages to the Home Office

Option 2: Click Wrap E-Sign

- Identify signing parties, enter their e-mail addresses and hit **NEXT**
- If any of the signing party is not present, the agent can type a personalized message at the bottom of the next screen and then send the application to the client via e-mail for signatures by clicking on **SEND MESSAGE**
- Parties not present access the application by clicking link in e-mail and entering the last 4 digits of their SSN
- Client must view the Terms of Use and completed application before proceeding
- Client will then be asked to agree or decline to sign the application
- If they decline to sign, an e-mail notification is sent to the agent stating as such
- The client will then certify that everything on the application is true, by clicking on the check box
- If paying by credit card the client will verify their information by selecting **ENTER PAYMENT DETAILS**. Otherwise, the client will then select **APPLY eSignature(s)** and submit the application to the agent
- Client will then have access to signed application
- Agent will be the last to sign the application after all other parties have signed

Option 3: E-Sign (Face to Face)

- Agent identifies signing party or parties which lead to the ID Verification Screen
- Signing parties provide ID and agree to the e-signature process
- If all parties don't agree, agent can print and wet sign
- If parties agree, they must view the Terms of Use and completed application before proceeding
- After closing the application, the applicant(s) and agent will confirm that the Terms of Use and application have been reviewed
- The client will then certify that everything on the application is true, by clicking on the check box
- If paying by credit card the client will verify their information by selecting **ENTER PAYMENT DETAILS**. Otherwise, the agent will then select **APPLY eSignature(s)** and then **SUBMIT** the application
- If using an iPad, parties will finger sign the application
- After signing and submitting, parties will be able to view and/or print e-signed forms and completed application

Option 4: Voice Signature

- Only Proposed Insured(s) will be allowed to voice sign the application
- If there are other parties involved (i.e. Payor, Owner (if different from client), agent, etc.) they will have to use another signature method
- After voice Signature is selected, the client and agent will be required to review the completed application
- Once application is reviewed, go to the next screen to enter Signed City and State
- If credit card is their payment method the client will verify their info by clicking on **ENTER PAYMENT DETAILS**. Otherwise, click the button at the bottom of the screen to Apply eSignatures
- After applying eSignatures, submit the application