

ADVISER FAQ



August 2022

What is DocuSign and why are they an AIA Australia partner?

DocuSign is an e-signature service that allows our teams to issue documents and request signatures electronically.

Helping us streamline processes and become more customer centric, DocuSign enables our clients to complete our forms on any of their devices. This can help your clients provide the required information much more quicker and easier than before and help remove some of the administrative duties freeing up more time for you. Furthermore, as this is a digital service, you will be able to maintain records much more efficiently.

Additionally, partnering with DocuSign empowers us to become more eco-friendly.

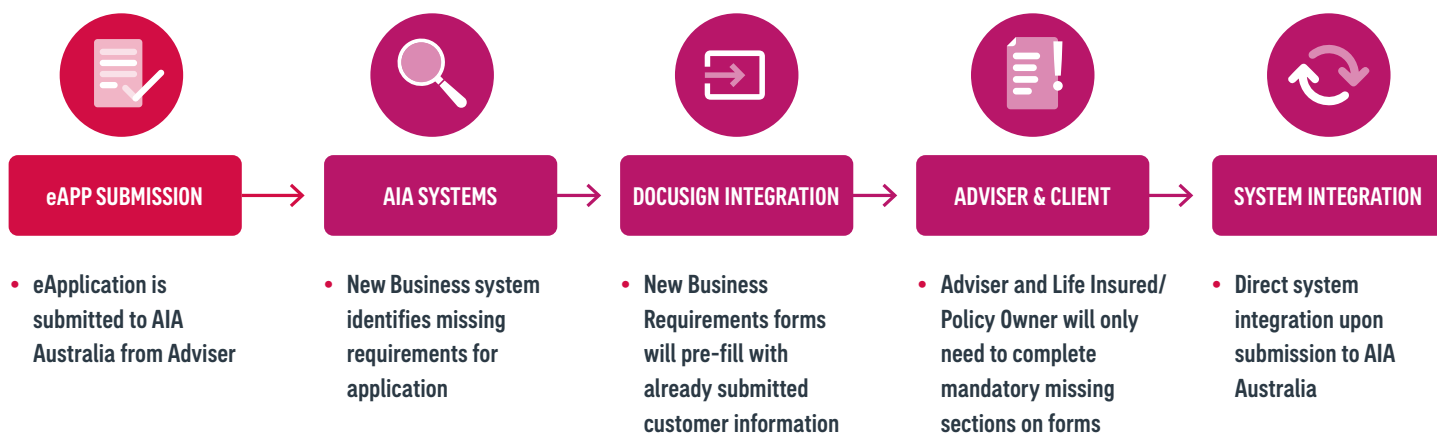
What services are available via DocuSign?

eApplication DocuSign Integration

DocuSign works together with our New Business Systems to allow for instantaneous system integration when completing new business requirements in real-time with customers.

Through this integration, Advisers can validate each form prior to sending them off to the Life Insured and/or Policy Owner.

Once approved and completed by the Life Insured and/or Policy Owner, the eApplication requirements will be marked off in our system as “received” in real-time.



Self-Servicing

Through DocuSign, Advisers can either send an **Adviser Use forms** that they can pre-fill that only requires the Life Insured and/or Policy Owner to sign.

Otherwise, they can issue a **Client Use forms** that the Life Insured and/or Policy owner will need to fill in and sign.

Once these forms have been completed by the Life Insured and/or Policy Owner, they will automatically be sent back to us for completion by our service teams, along with a completed copy sent to all parties involved in the signing order.

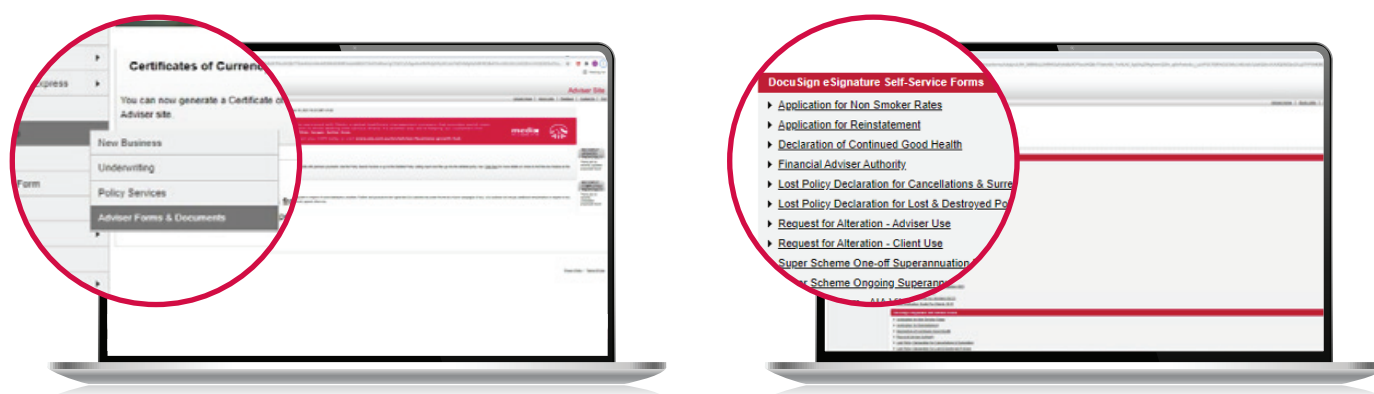


Can I generate a form for our clients to complete and which forms are currently available via DocuSign?

Yes, you can generate a form for the clients to complete via DocuSign.

We currently have a range of forms across Underwriting, New Business, Existing Business and Claims that can be issued through DocuSign.

They are available via the **Adviser Site Under Procedures & Forms, Adviser Forms & Documents** within the section **DocuSign eSignature Self-Service Forms**. Please [click here](#) for a video tutorial on generating self-service forms and [click here](#) for a video tutorial on completing a DocuSign envelope.



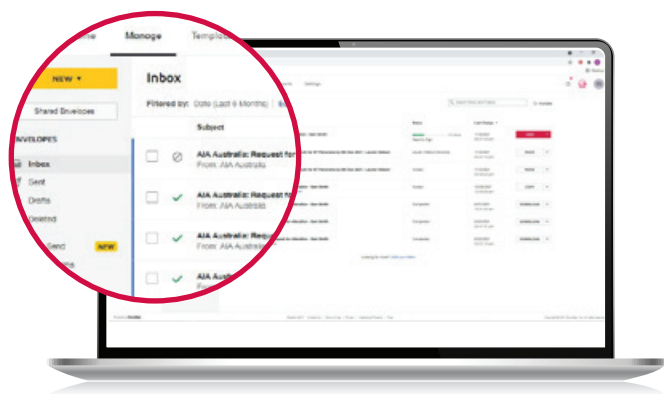
Will advisers or customers need to create a DocuSign account to view & complete forms?

No, customers will have the option of creating a DocuSign account, but it is not required to complete these forms.

If you were to create a DocuSign account, it will assist with easily managing envelopes that are in circulation or that have been finalised.

Am I able to see what forms have been sent to me or my customers?

Yes, if you have a DocuSign account with the same email address used, you'll be able to see all envelopes that have been sent to you along with the forms awaiting to be finalised by your customers. Please [click here](#) for a video tutorial on managing envelopes.



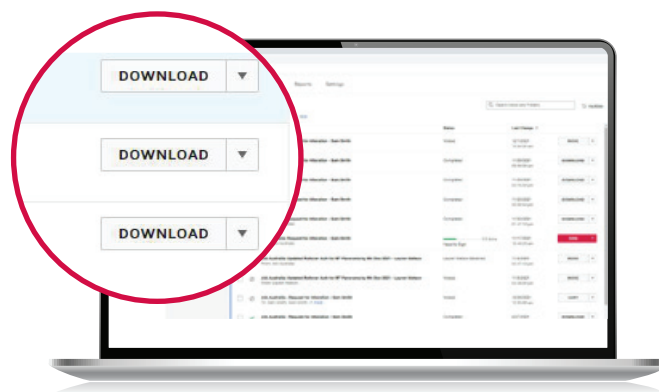
Will I receive a copy of my completed forms?

Yes, as a recipient, you will receive an email that contains a link that will allow you to view and download the completed form once all signatories have finished their steps to finalise the document.

Can I download the completed form for my records?

Yes, you can download it from the original completion email or in the DocuSign portal by creating a DocuSign account with your associated email address that's been receiving DocuSign forms.

In the DocuSign portal, navigate to the manage section, you will be able to identify what forms are currently in circulation along with what forms have been completed.



Do I need to send a completed document to AIA Australia?

No, all completed AIA Australia DocuSign envelopes will be sent directly to the appropriate operations teams for processing.

Can I edit a completed DocuSign envelope?

No, unfortunately you will not have the ability to edit what's already in DocuSign.

What will happen if I or the customer does not respond to a DocuSign email?

All forms sent via DocuSign will expire after **90 days** if not completed. However, **Special Acceptance Terms** forms is the only form that will **expire after 30 days**.

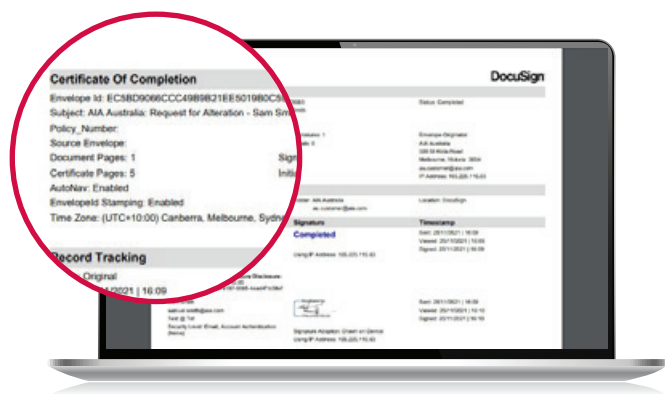
Please note all parties receiving a DocuSign form will receive reminder notifications every 14 days prior to the form expiring.

What does it mean when I receive an email from DocuSign with the subject line "Voided"?

If you or a customer receive an email from DocuSign titled "Voided", this means that this document is no longer required for completion and no further action is necessary.

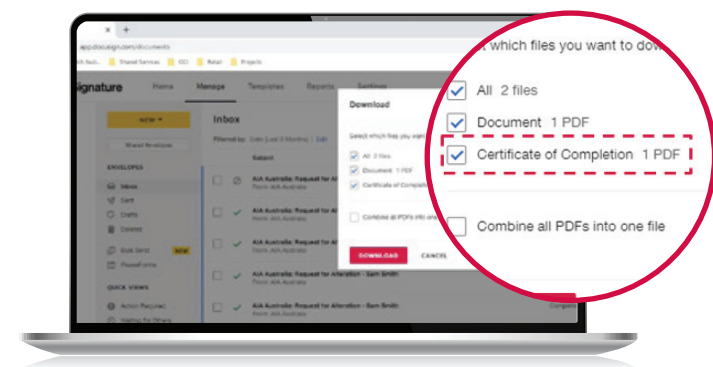
Does DocuSign stand as a legal document?

Yes, DocuSign provides all signatories a “Certificate of Completion” once a document has been completed. This is an overview and audit that provides and authenticates information about who signed the documents and their associated IP addresses.



Where can I access a “Certificate of Completion”?

Once a document has been completed, you can navigate to “Options” and select “Certificate”. Please [click here](#) for a video tutorial on downloading a Certificate of Completion.



This “Certificate of Completion” can be downloaded as a PDF for your own records.

What forms are not eligible for DocuSign?

Any form that requires a “Witness” signature is currently not available via DocuSign due to Australian legislation.

This may change in the near future. If so, AIA Australia will provide the necessary updates when available.

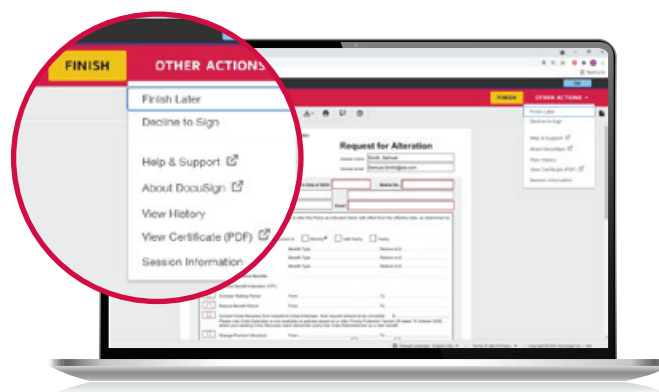
How do I update my email address?

If you need to update your email address, please contact your Business Development Manager, Client Development Manager or our Customer Service team.

What if I do not want to complete the DocuSign form?

If you no longer wish to proceed with a DocuSign form, you can request to “Void” the document while it’s open by selecting “Options” and then “Void”.

This will ensure that you will no longer receive reminder emails associated with the voided form. Please [click here](#) for a video tutorial on stopping reminder notifications.



Am I able to opt-out of DocuSign?

If your preference is that we do not reach out to your customers directly, you are able to opt-out of this process by contacting our Distribution team and supplying your AIA Australia Adviser Code.

If you choose to opt-out, you will not receive DocuSign via automated method for new business policy maintenance requirements. Please note AIA Australia representatives may still send you forms via DocuSign outside of the above.