Manage an eSignature Envelope

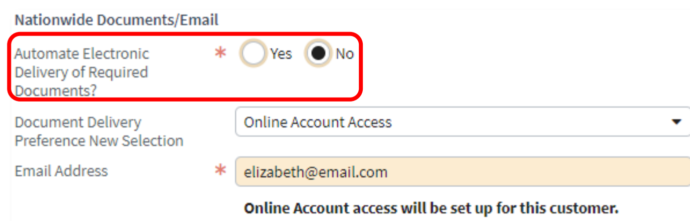
Description:
This job aid reviews how to manage, void, and resend an eSignature envelope. The eSignature envelope can be managed from the individual policy or from the **Team** tab. eSignature envelopes, on the **Team** tab, can be managed from both the Agency level, or individual producer level. This job aid walks through both processes.

Through the *Manage Envelope* process, you can resend an envelope to correct an email address or if a member did not receive the envelope the first time. However, you cannot add additional documents to an existing envelope. To add additional documents, you would need to send a separate request or void the existing envelope, create a new envelope, and add the additional documents to the new envelope prior to sending.

You may manage the eSignature envelope in two different ways:

- Individual Policy
- Team Tab

At the completion of the policy creation process in PolicyCenter, agents email various documents to members, creating an envelope containing these documents. PolicyCenter allows you to automatically send these eSignature documents to the member using an **Automated Electronic Delivery of Required Documents** function on the *Policy Info* screen.



If the Automated question is answered "**Yes**," licyCenter automatically emails all required documents to the member. However, any optional documents are NOT emailed and requires the agent to perform a manual procedure once the policy is complete to send those optional documents. If you answer "**No**" to the Automated question, agents can do the manual procedure and include BOTH required and optional documents in the eSignature envelope.

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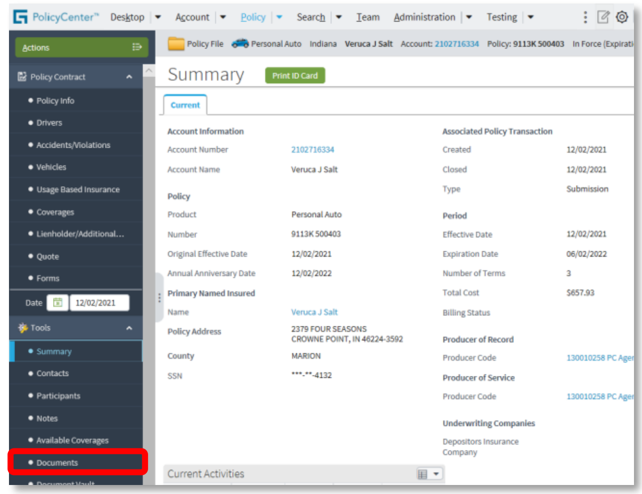
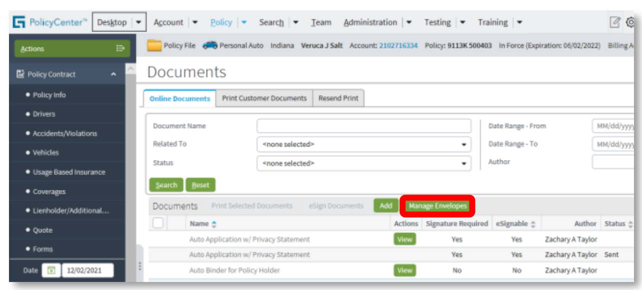
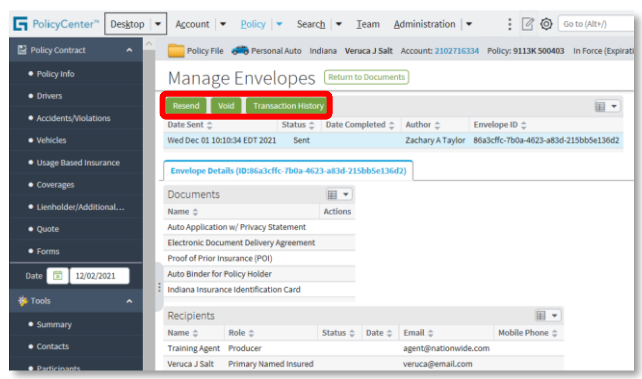
Individual Policy

Step	Action	Screen
1	After navigating to the policy: • Click on the **Documents** link in the *Tools* section of the *Left Navigation Bar.*	
2	On the *Documents* screen: • Click the **Manage Envelopes** button. **Note:** The **Manage Envelopes** button displays after an envelope has been sent.	
3	On the *Manage Envelopes* screen: • To resend the eSignature envelope, click the **Resend** button and go to [Step 4](#). • To void the eSignature envelope, click the **Void** button and go to [Step 7](#). • To view the document's Transaction History, click the **Transaction History** button and go to [Step 8](#).	

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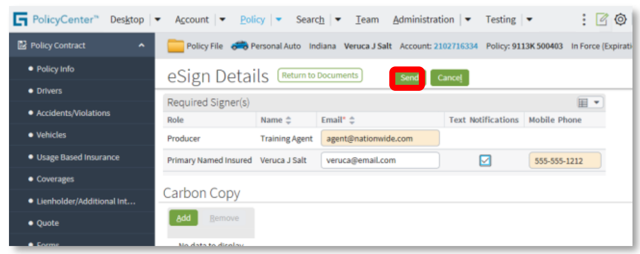
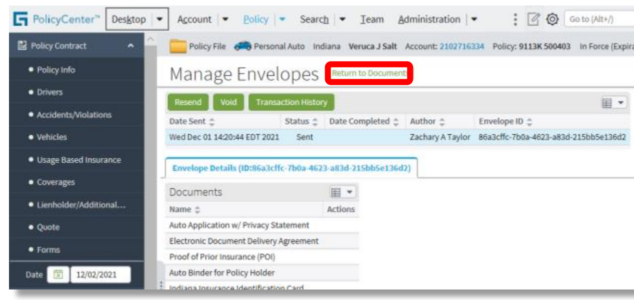
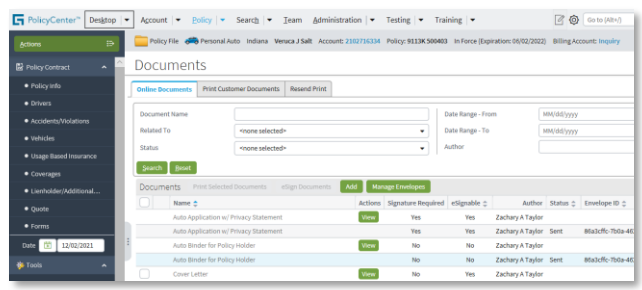
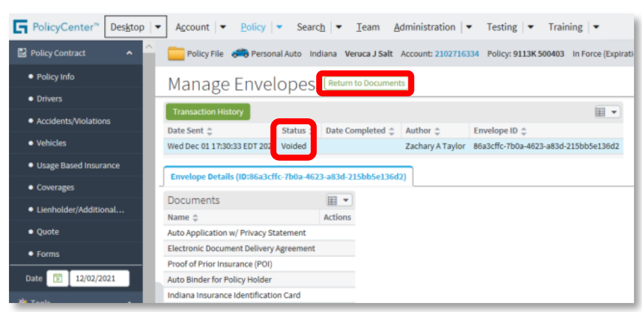
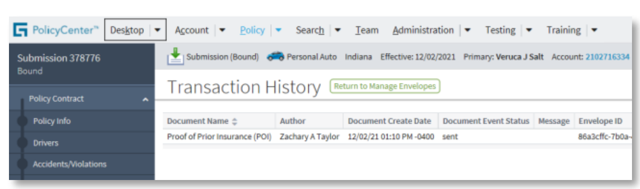
4	On the *eSign Details* screen: • Update the appropriate email addresses, if necessary. • Click the **Send** button.	
5	The system will re-display the *Manage Envelopes* screen. An email is sent to all recipients to take appropriate action using the eSignature functionality. • Click the **Return to Documents** button.	
6	On the *Documents* screen, a new set of documents is created with the new send date (not shown here)	
7	On the *Manage Envelopes* screen, the envelope status is listed as *"Voided"*. • Click the **Return to Documents** button.	
8	On the *Transaction History* screen, you may view the eSignature envelope status details.	

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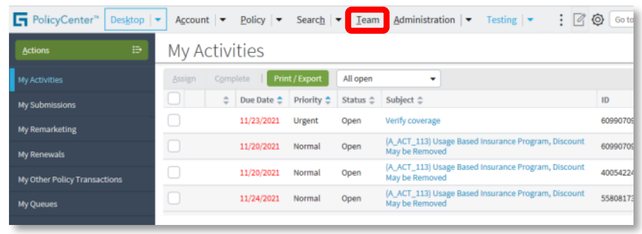
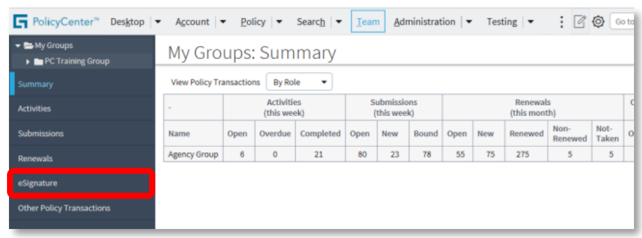
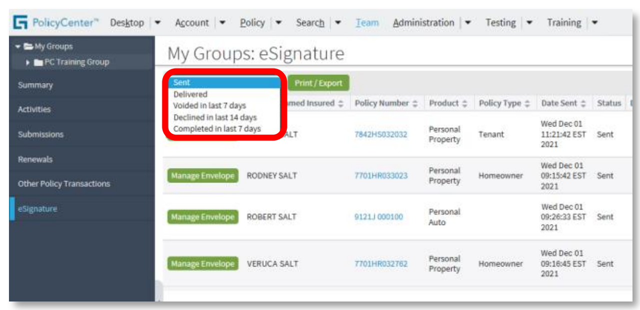
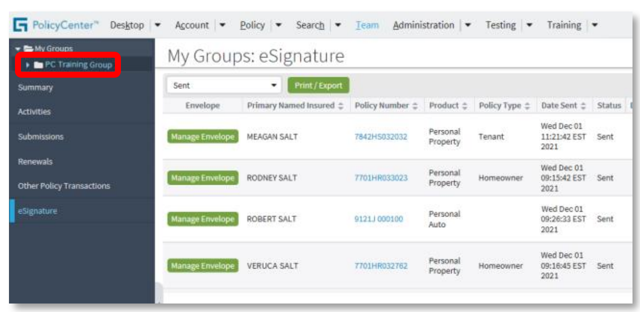
Team Tab

Step	Action	Screen
1	From any screen in PolicyCenter: • Click on the **Team** tab on the *Tab Navigation Bar*.	
2	On the *My Groups: Summary* screen: • Click on the **eSignature** link.	
3	On the *My Groups: eSignature* screen, the system defaults the view to envelopes with a **"Sent"** status. **Note:** The view status can be changed to "**Delivered**," "**Voided in the last 7 Days**," "**Declined in last 14 days**," and "**Completed in last 7 days**."	
4	eSignature envelopes for the entire Agency display by default. To view envelopes for a specific producer: • Click on the **arrow** next to the folder with the Agency name in the *Left Navigation Bar*.	

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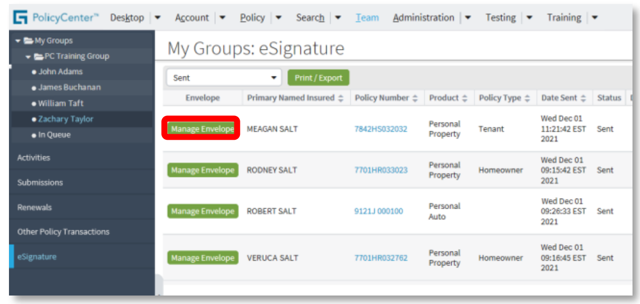
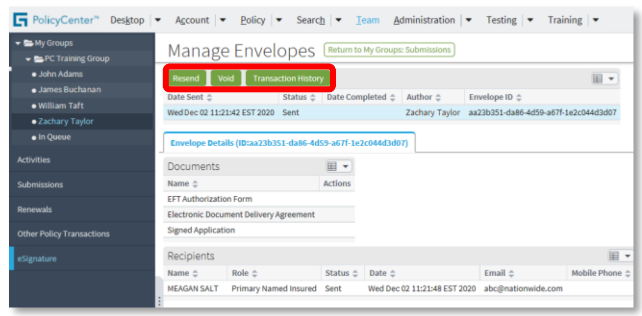
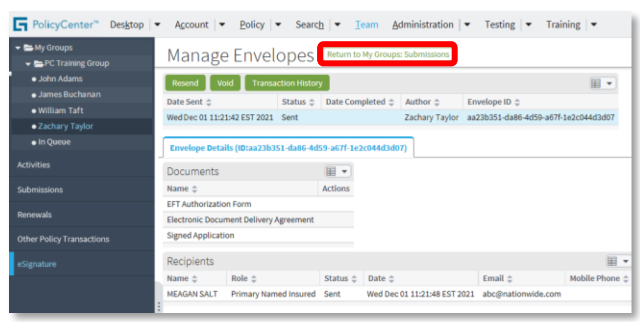
5	On the *My Groups: eSignature* screen: • Select the desired agent from the list. • Click on the **Manage Envelope** button of the policy which needs to be managed.	
6	Management of the envelope follows the same process whether you access it from the **Team** tab or from the individual policy. On the *Manage Envelopes* screen: • To resend the eSignature envelope, click the **Resend** button. • To void the eSignature envelope, click the **Void** button. • To view the document's Transaction History, click the **Transaction History** button.	
7	To view additional eSignature envelopes from the **Team** tab: • Click the **(Return to MyGroups: Submissions)** link at the top of the screen. This will return you to the **Team** tab.	

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