Employee Guide – How to Complete My Evidence of Insurability on DocuSign PowerForm

General Notes

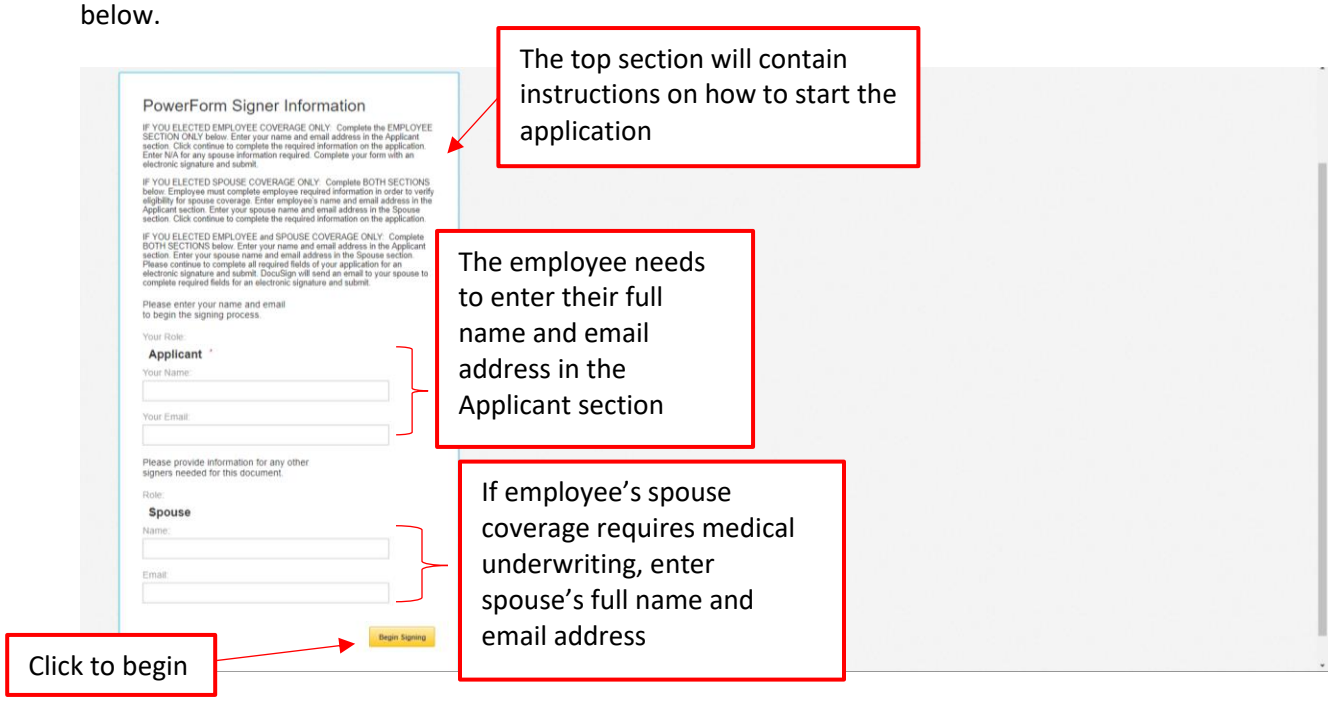
- DocuSign is set up for the employee (Applicant) to complete the application first.
- For both employee and spouse applications, the employee must enter their name and email address as well as their spouse's name and email address. This activates DocuSign to send an email for the spouse to complete their portion of the application and electronically sign.
- Once completed, DocuSign will send the completed application to the employee and RSL Medical Underwriting for processing.

Step 1: The employer will send/post the PowerForm EOI URL for the employee to access the Evidence of Insurability electronically.

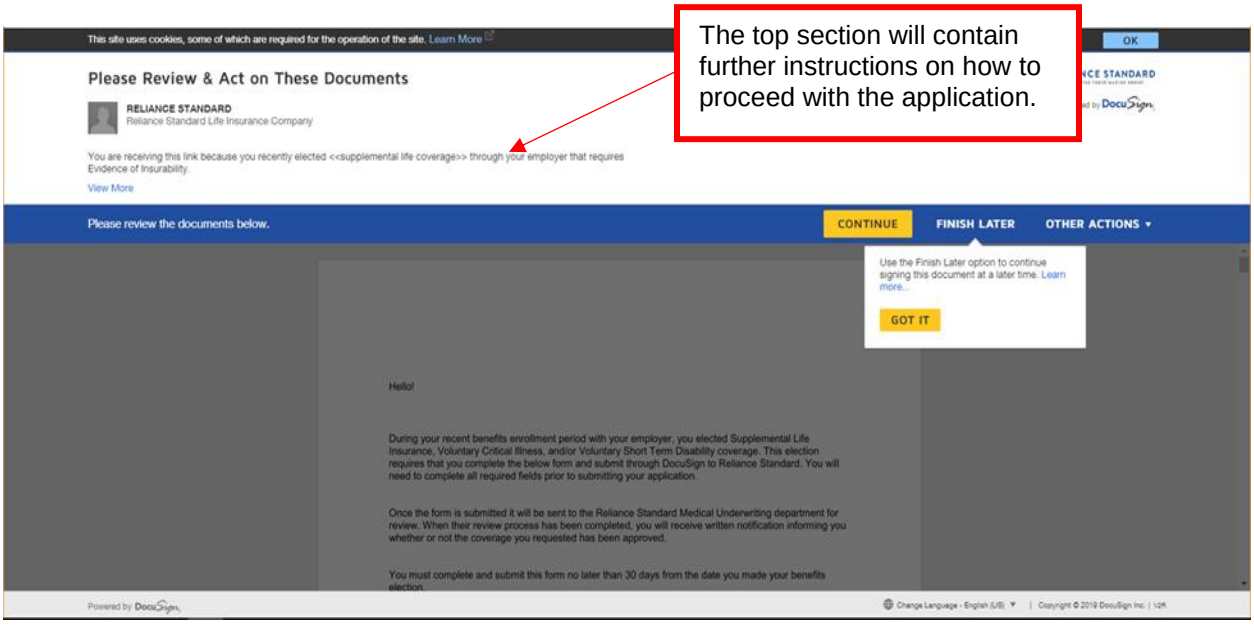
The link may look similar to the following example:

https://na3.docusign.net/Member/PowerFormSigning.aspx?PowerFormId...

Step 2: Once the employee clicks on the link, they should see the following landing page as shown below.

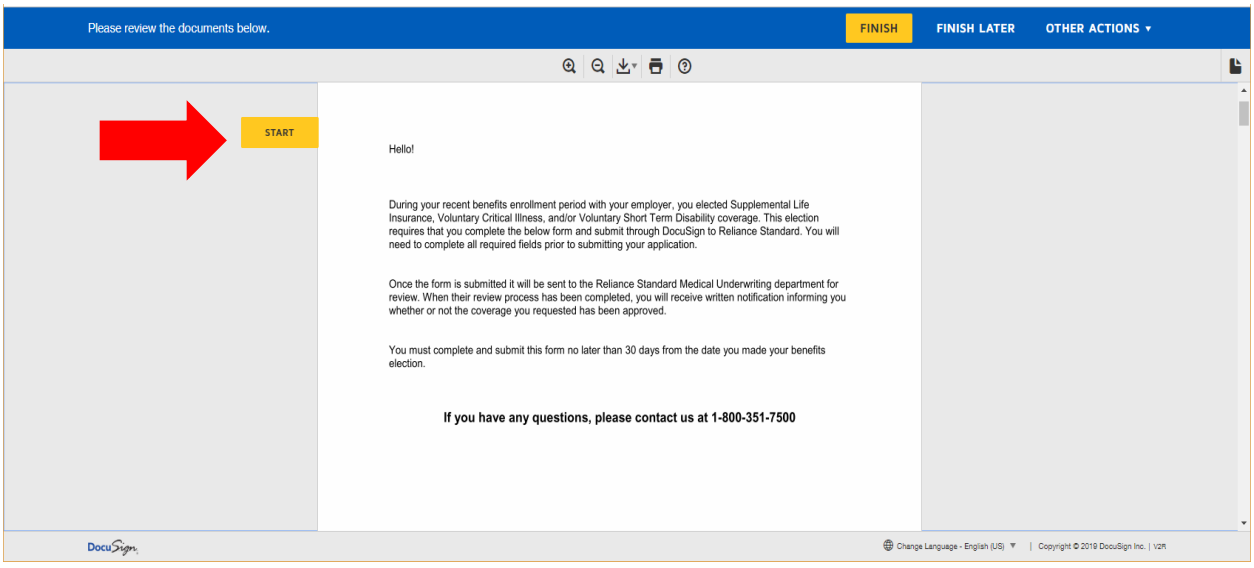


Step 3: The employee will see the following screen. Click “Continue.”

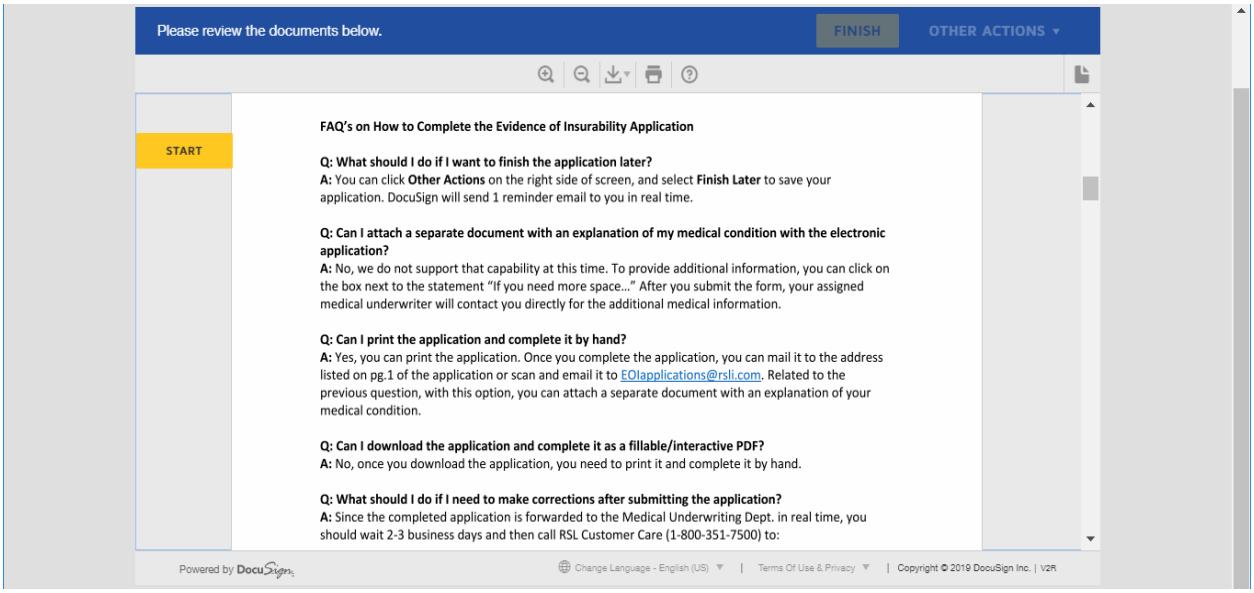


Step 4: Once the employee clicks “Continue,” they will see the cover letter that contains the coverage information and the [30]-day timeframe to complete the application.

Step 5: After reading the cover letter, click “Start.”



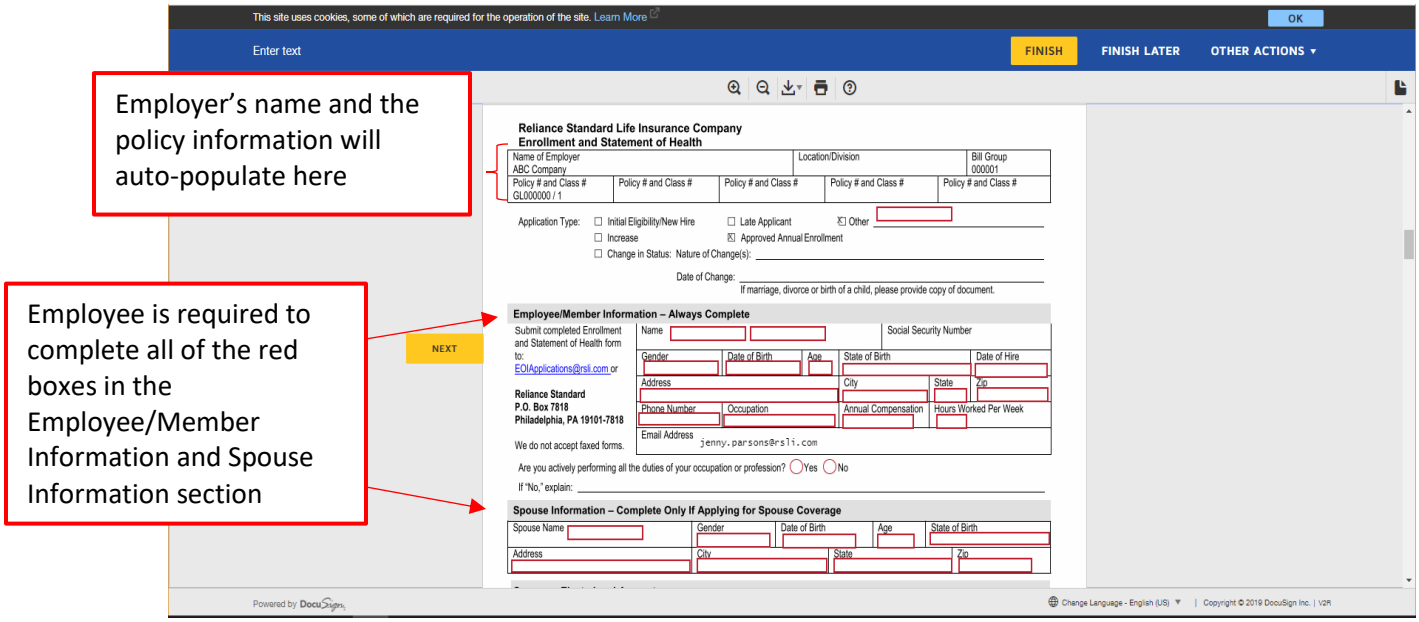
Step 6: The employee will scroll to the next screen that contains a FAQ page.



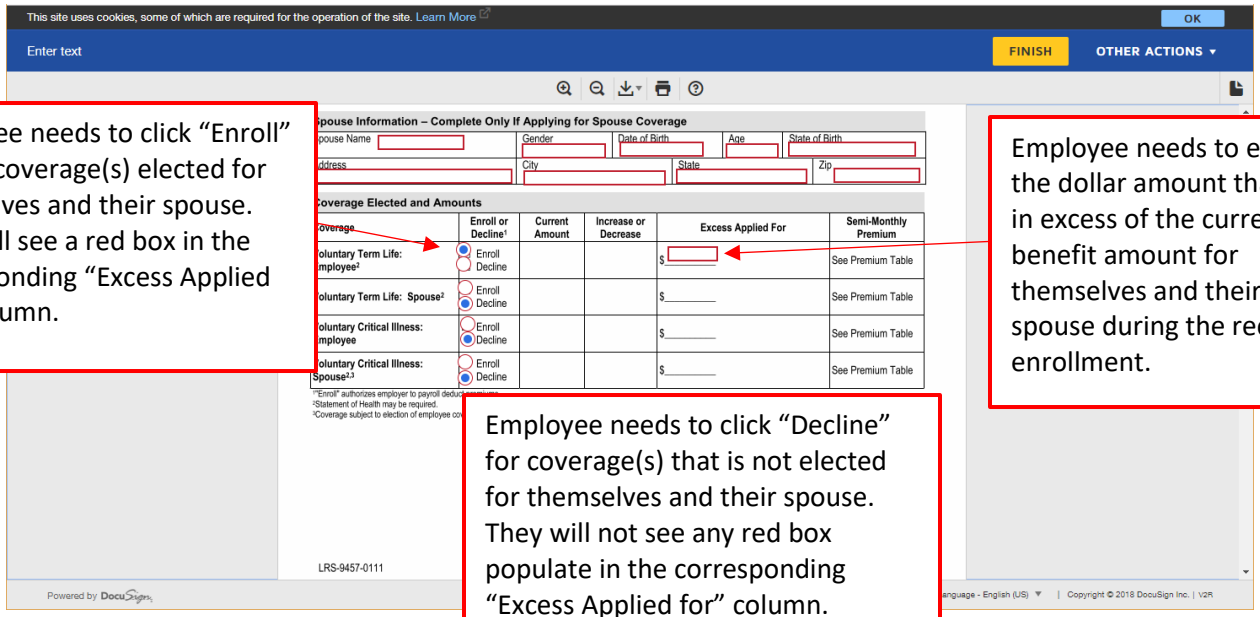
Step 7: The employee can either click "Next" on the left side of the screen or scroll to the next page to begin the application.

Step 8: The employee will see their employer's name auto-populated on the top section of the application.

The employee will be required to fill in all of the fields that are marked with red boxes as shown below.



Step 9: The employee is also required to complete all of the fields in the "Coverage Elected and Amounts" section for Employee and Spouse elections if applicable.

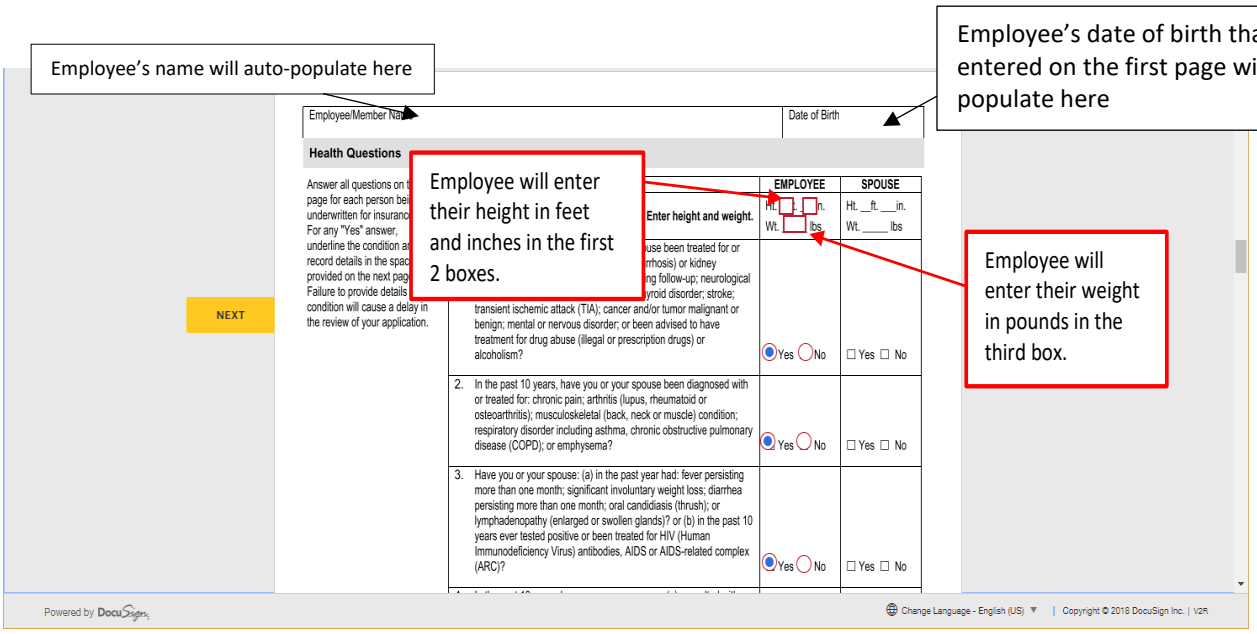


Employee needs to click "Enroll" for the coverage(s) elected for themselves and their spouse. They will see a red box in the corresponding "Excess Applied For" column.

Employee needs to enter the dollar amount that is in excess of the current benefit amount for themselves and their spouse during the recent enrollment.

Employee needs to click "Decline" for coverage(s) that is not elected for themselves and their spouse. They will not see any red box populate in the corresponding "Excess Applied for" column.

Step 10: The employee can scroll to the next page and enter their height and weight in the red boxes as shown below.



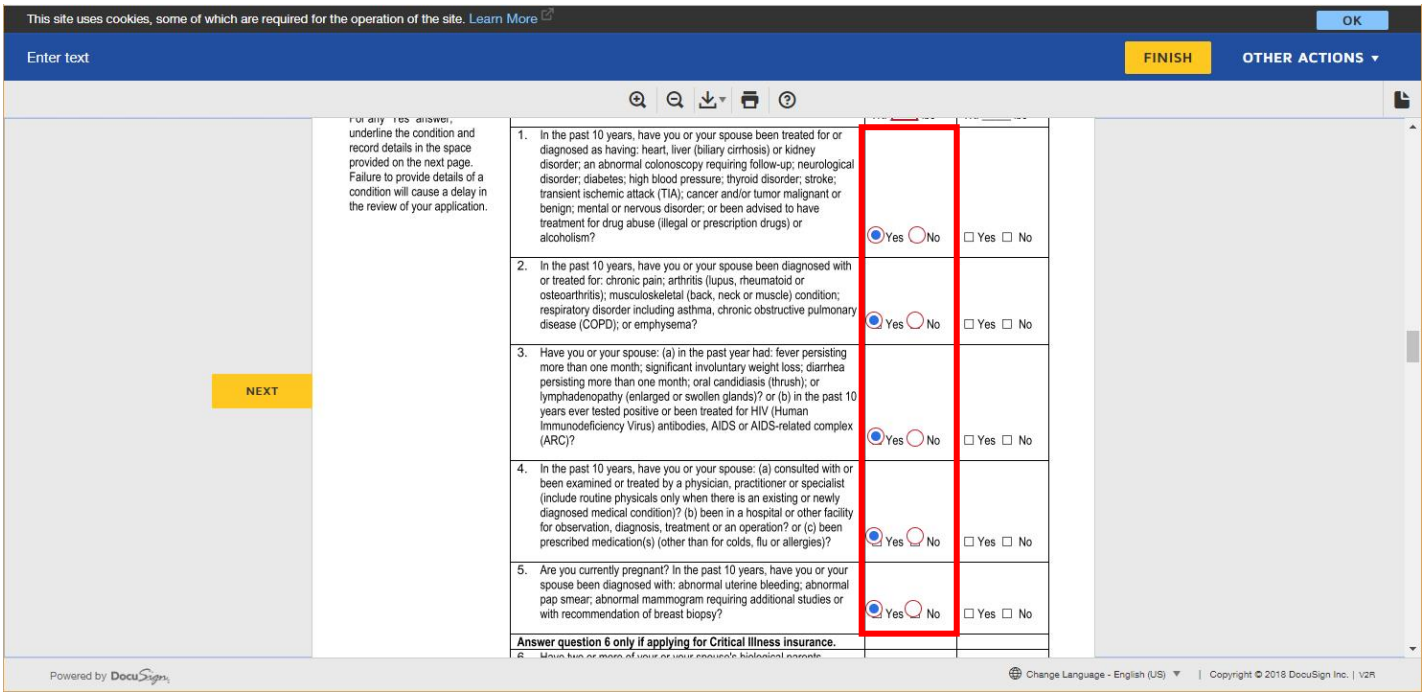
Employee's date of birth that was entered on the first page will auto-populate here

Employee will enter their height in feet and inches in the first 2 boxes.

Employee will enter their weight in pounds in the third box.

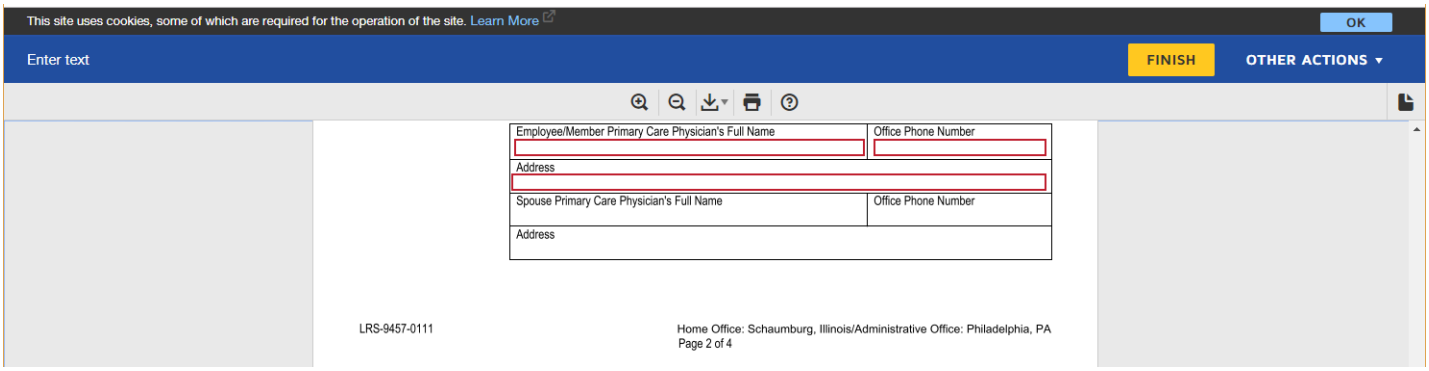
Step 11: Next, the employee will read and provide their responses to the health questions.

If the employee responds “Yes” to any of the questions, they will be required to enter their responses in the required fields on the next page.

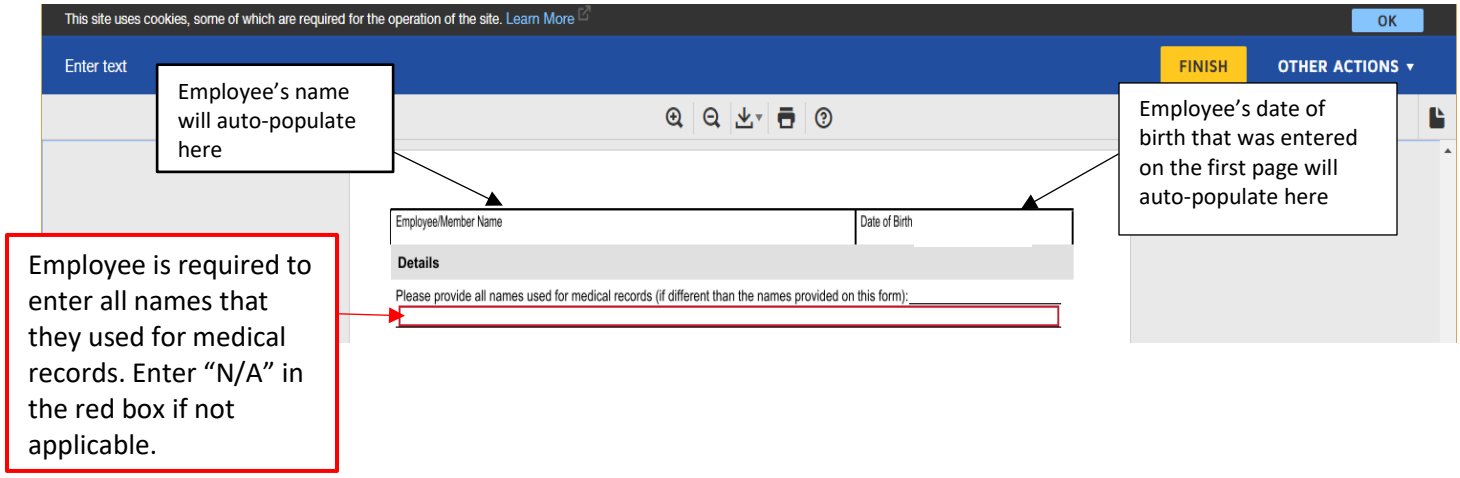


Step 12: The employee is required to enter their primary care physician’s information.

If the employee does not have a primary care physician, they must enter “N/A” in the red boxes as shown below.

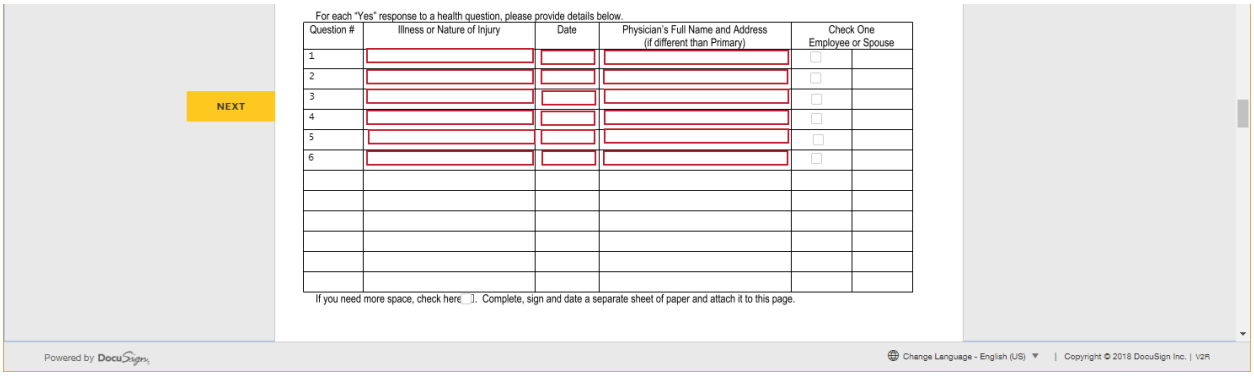


Step 13: The employee can scroll to the next page and provide their response to the statement indicated below.



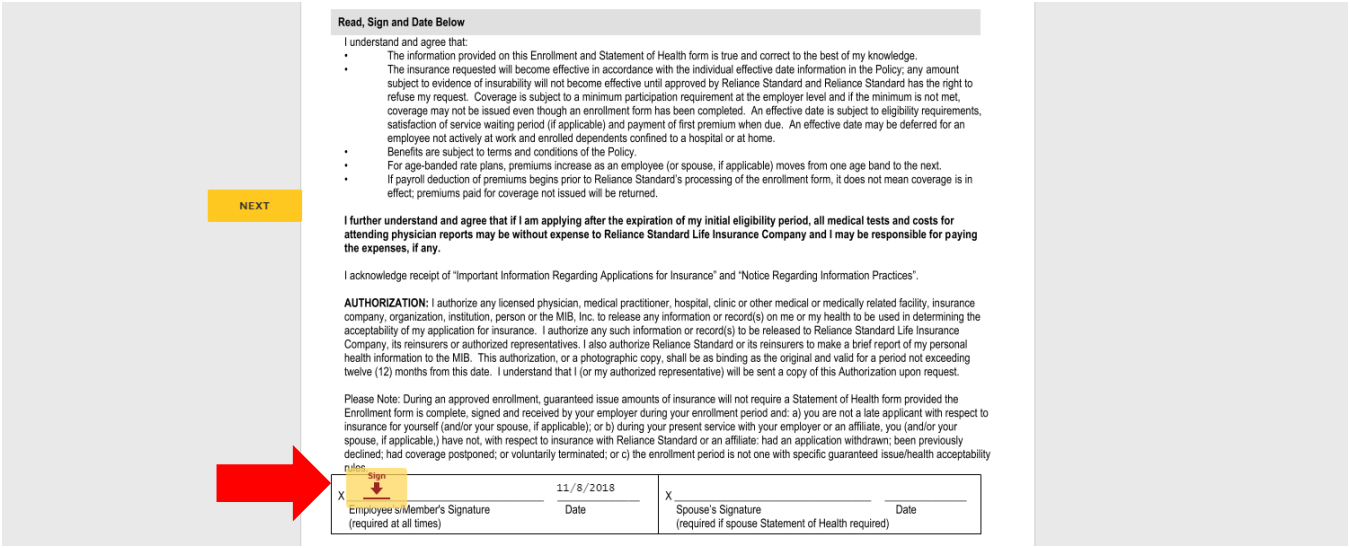
Step 14: As noted in a previous step, if the employee responds "Yes" to any of the questions, they will be required to enter their responses in the required fields on the page as shown below. If the employee answered "No" for any of the health questions on page 2, the red box will not populate for that particular question.

Please note: Depending on the line of coverage that the employee elected, there will be a correlating number of lines for the responses to the health questions.



Step 15: Once the employee completes the health question responses, they can scroll down to the Signature page as shown below.

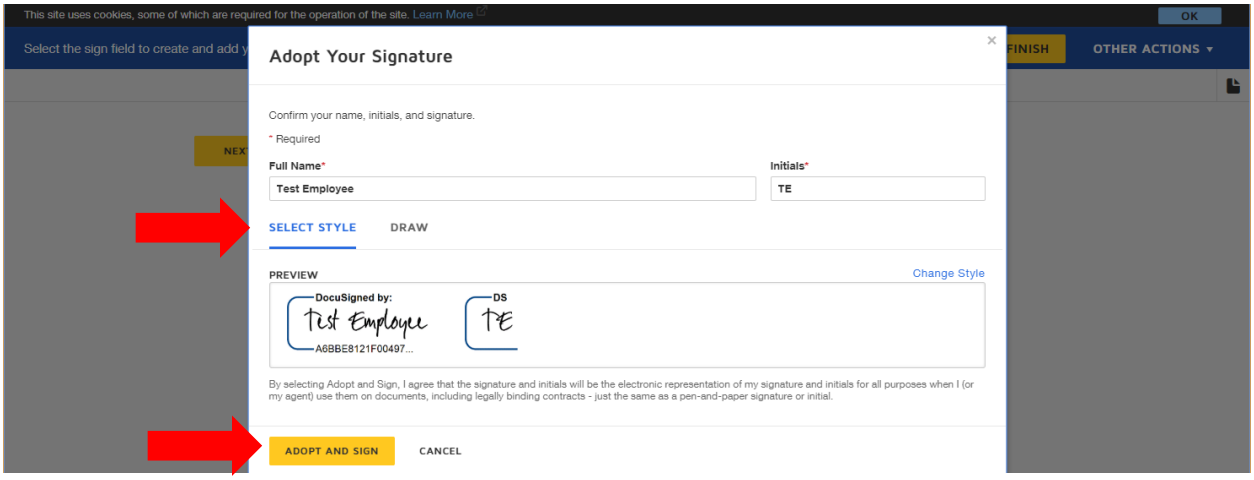
Please note: The date field will be auto-populated with the current date.



Step 16: Click "Sign" and a new pop-up window will appear as shown below.

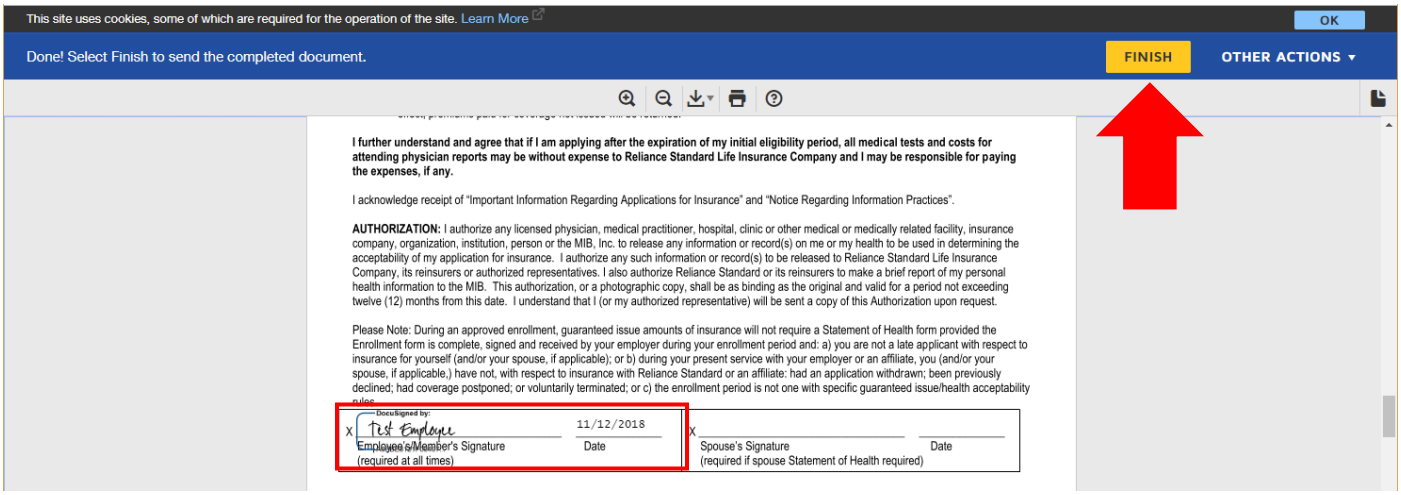
Step 17: The employee's full name will auto-populate and they can select the font style or draw their own signature for the document.

Click "Adopt and Sign."



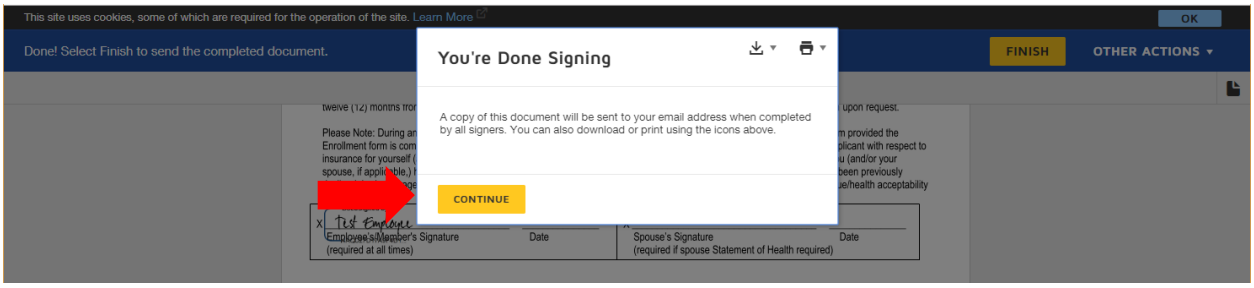
Step 18: The employee will see the signature populate on the Signature line as shown below.

Click “Finish” to submit the application.

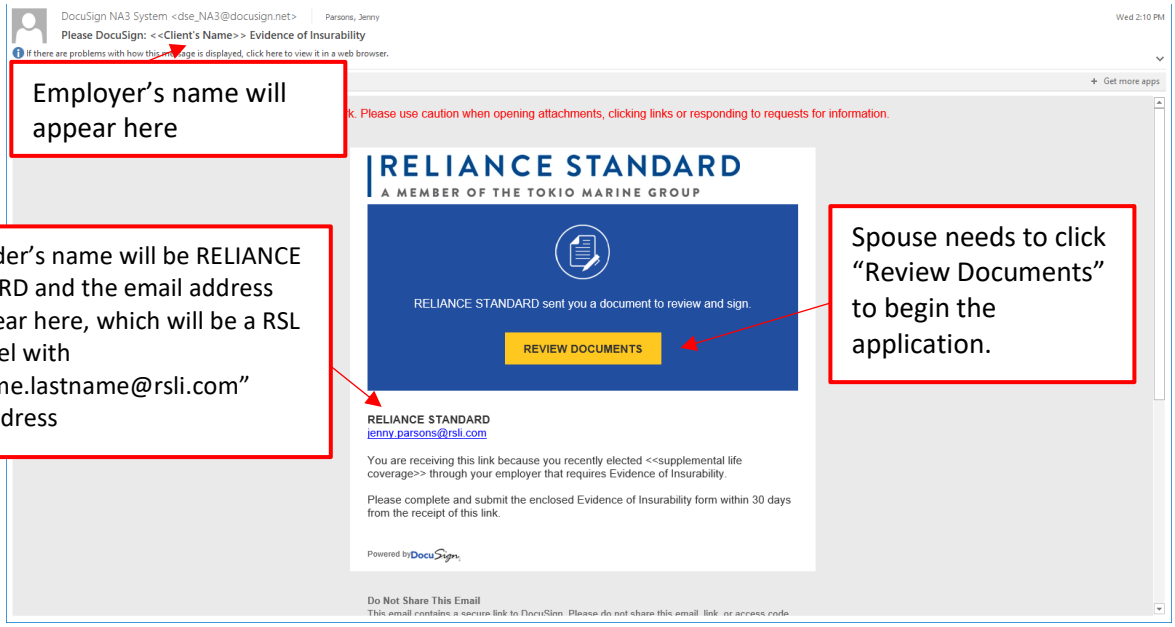


Step 19: A new pop-up window will appear to indicate that the employee has completed their portion of the application.

The employee can click “Continue.”



Step 20: After the employee completes their portion of the application, DocuSign will send the spouse an email to begin their portion of the application.

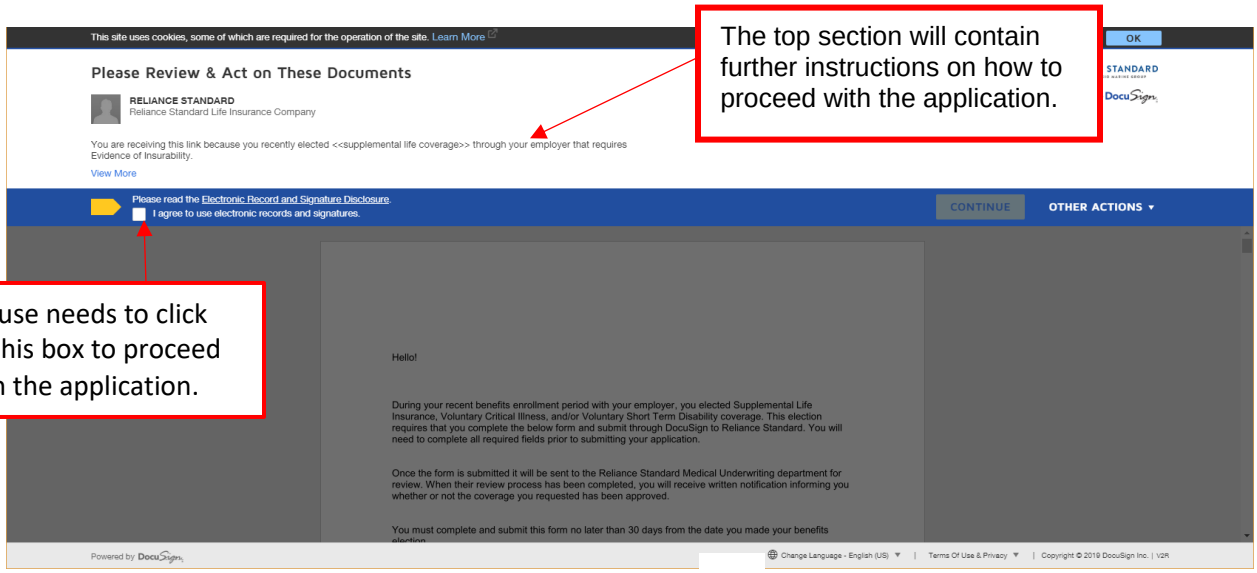


Employer's name will appear here

The sender's name will be RELIANCE STANDARD and the email address will appear here, which will be a RSL personnel with "firstname.lastname@rsli.com" email address

Spouse needs to click "Review Documents" to begin the application.

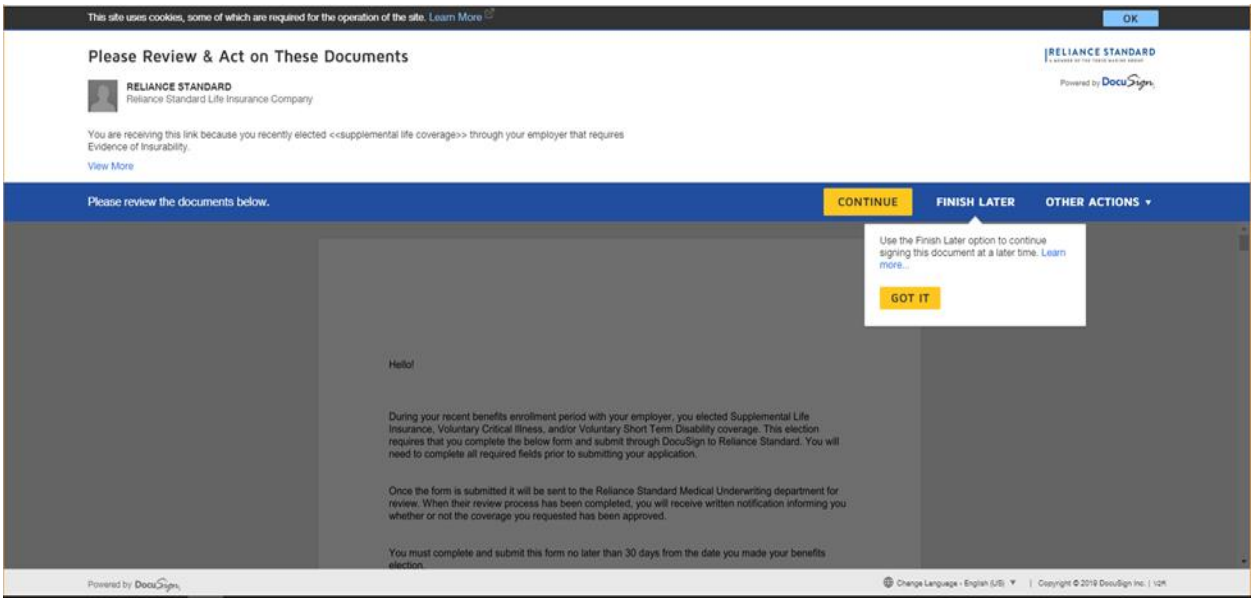
Step 21: The spouse will see the following screen that will contain the agreement to use electronic signature.



The top section will contain further instructions on how to proceed with the application.

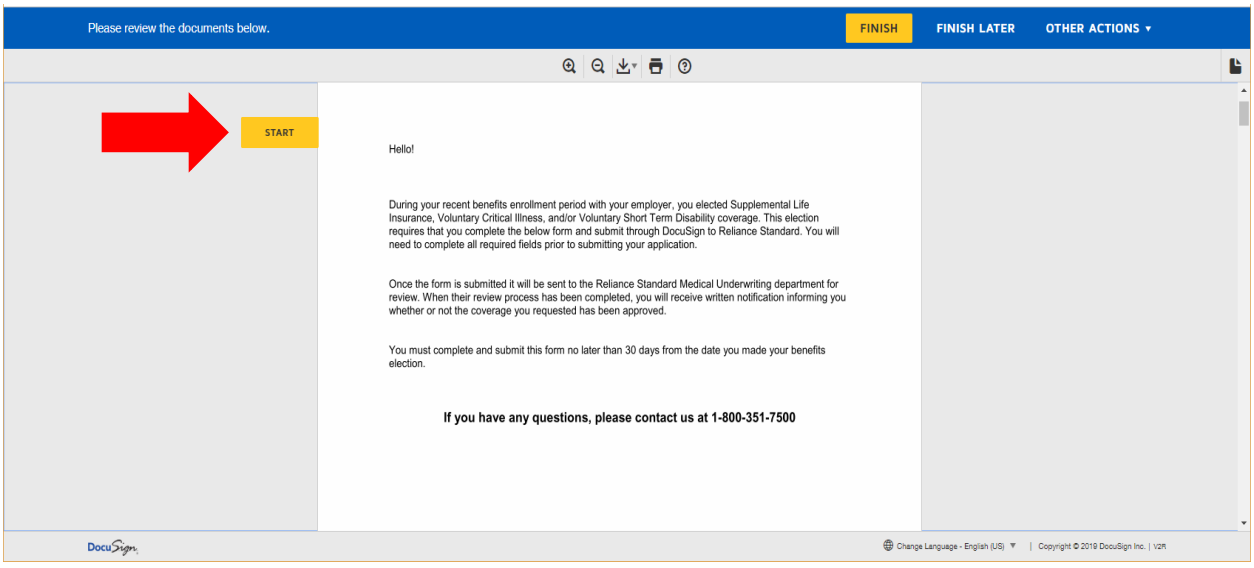
Spouse needs to click on this box to proceed with the application.

Step 22: Once the spouse clicks on the box indicating the consent for electronic signature, they will see the "Continue" button will be enabled on the right hand side of the screen. Click "Continue."

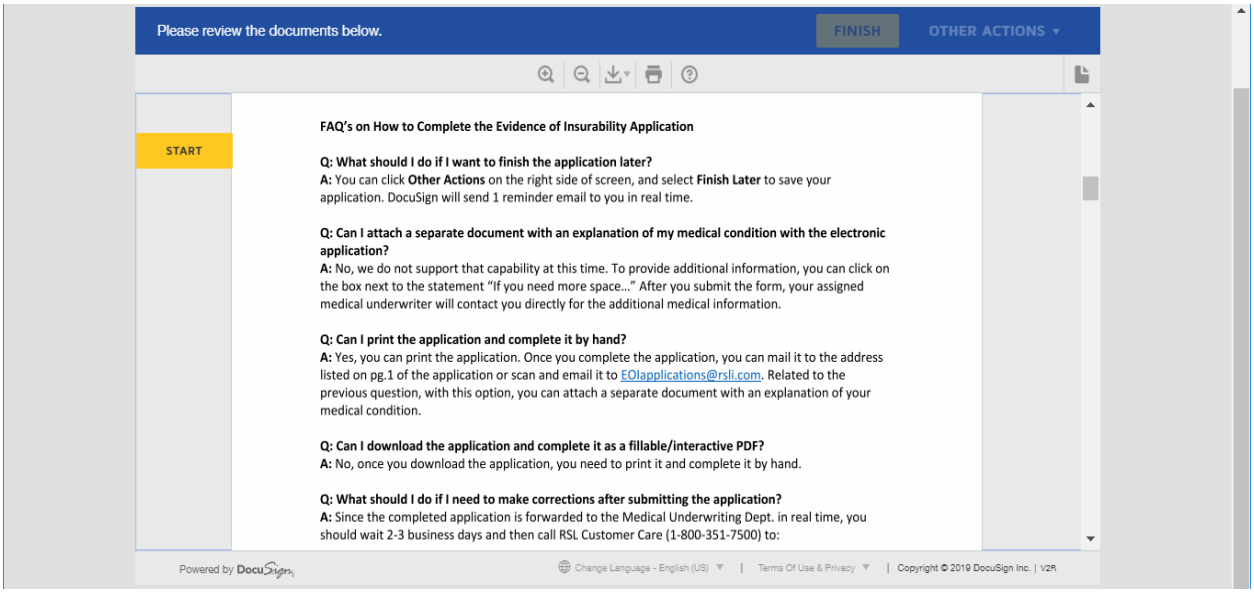


Step 23: Once the spouse clicks "Continue," they will see the cover letter that contains the coverage information and the [30]-day timeframe to complete the application.

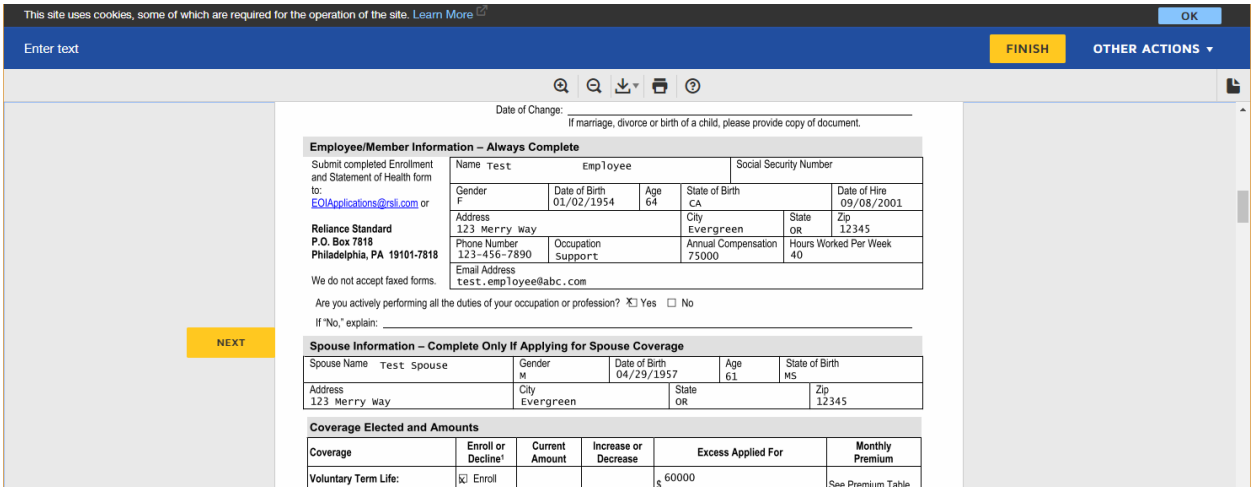
Step 24: After reading the cover letter, click "Start" or scroll to the next page.



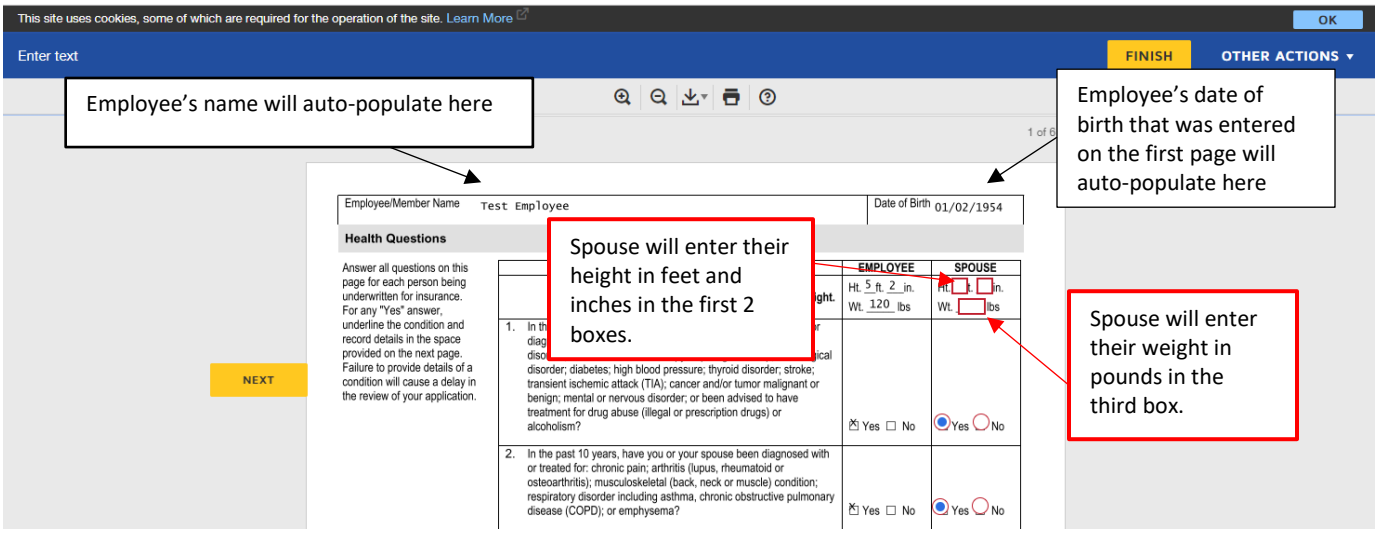
Step 25: The spouse will scroll to the next screen that contains the same FAQ page that the employee viewed.



Step 26: The spouse will scroll to the next page to see the pre-filled information that the employee entered on page 1. The spouse should review to verify the information in the Spouse Information section and Coverage Elected amount.

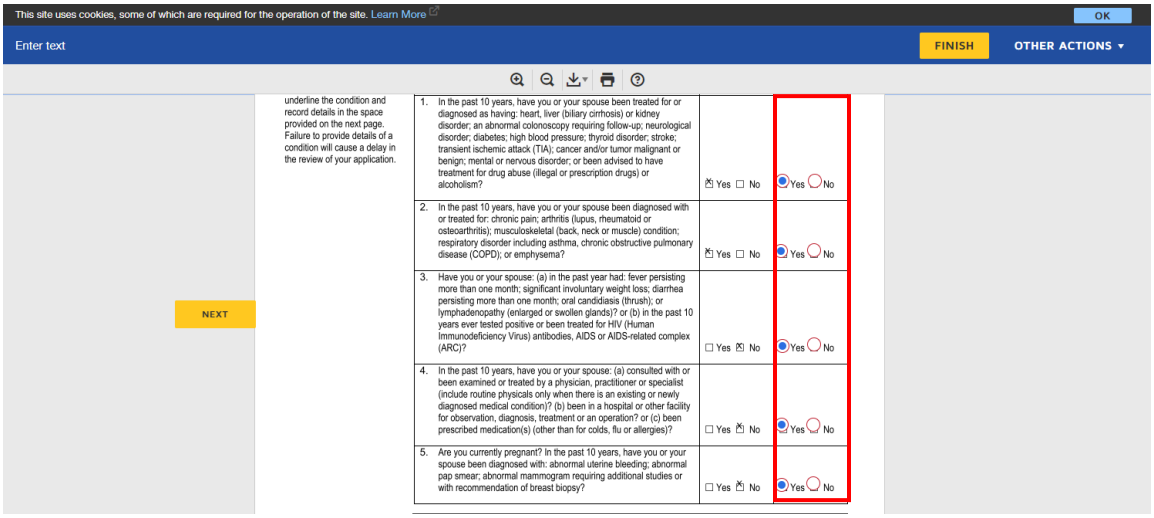


Step 27: The spouse can click “Next” or scroll to the next page and enter their height and weight in the red boxes as shown below.



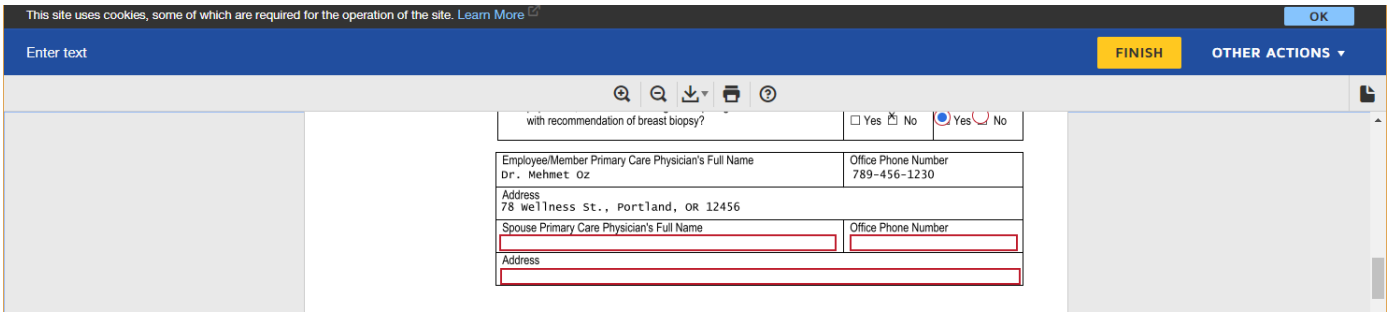
Step 28: Next, the spouse needs to provide their responses to the health questions.

If the spouse responds “Yes” to any of the questions, they will be required to enter their responses in the required fields on the next page.



Step 29: On the bottom of page 2, the spouse is required to enter their primary care physician's information.

If the spouse does not have a primary care physician, they must enter "N/A" in the red boxes as shown below. If they leave those red boxes blank, they will not be able to complete the application.

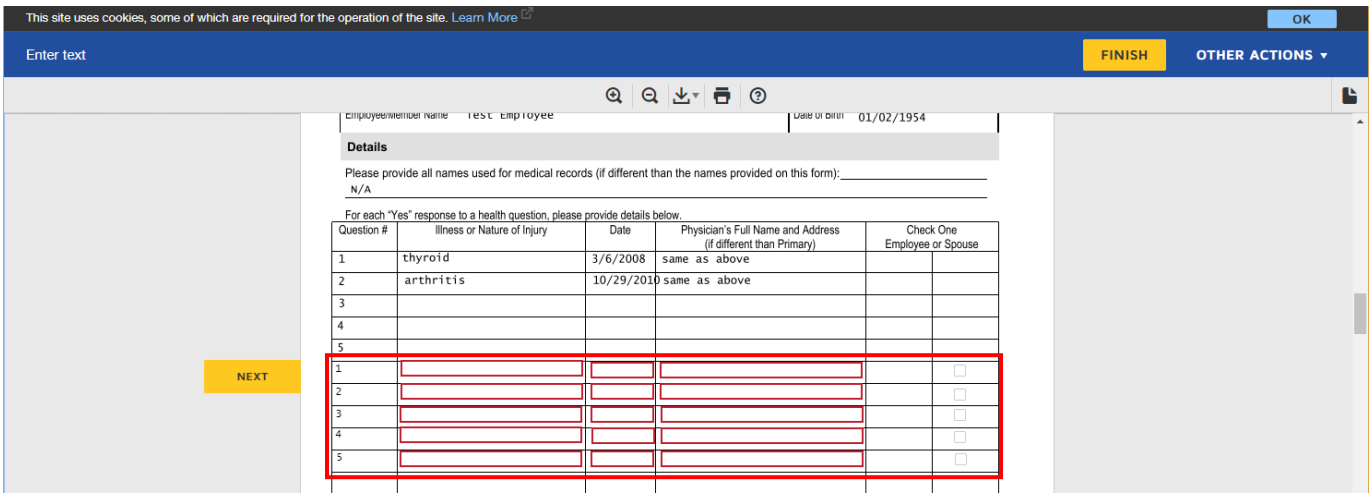


Step 30: On page 3, the spouse is required to provide their responses in the second set of red boxes labeled "# 1-5" as shown below.

Please note: As noted in a previous step, if the spouse responds "Yes" to any of the questions, they will be required to enter their responses in the required fields on the page as shown below. If the spouse answered "No" for any of the health questions on page 2, the red box will not populate for that particular question.

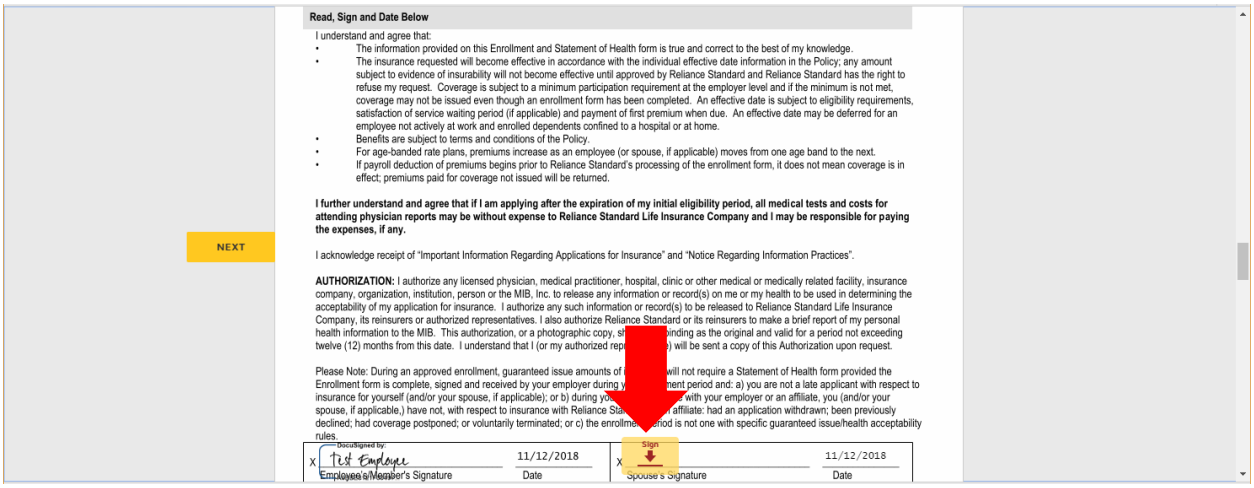
Depending on the line of coverage that the employee and spouse elected, there will be a correlating number of lines for the responses to the health questions.

Since the employee was required to complete their portion of the application first, the spouse will see the employee's responses (if any were entered) in the first 5 or 6 lines of this section.



Step 31: Once the spouse completes the health question responses, they can scroll down to the Signature page as shown below.

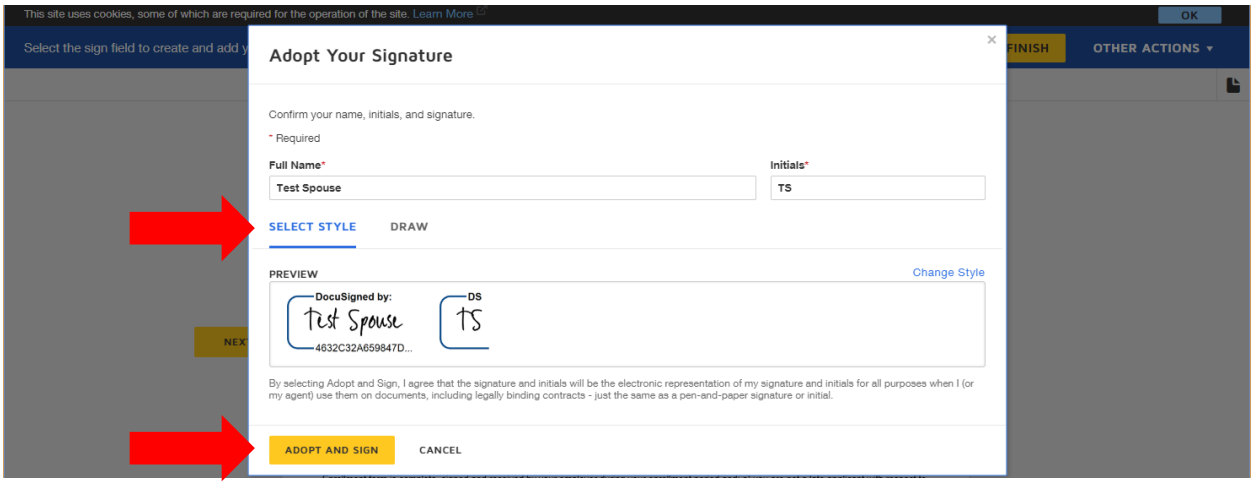
Please note: The date field will be auto-populated with the current date.



Step 32: Click "Sign" and a new pop-up window will appear as shown below.

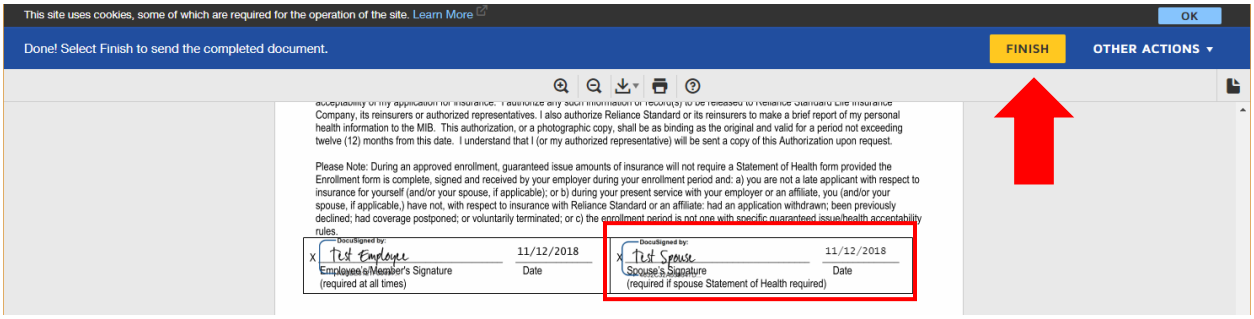
Step 33: The spouse's full name will auto-populate and they can select the font style or draw their own signature for the document.

Click "Adopt and Sign."



Step 34: The spouse will see the signature populate on the Signature line as shown below.

Click “Finish” to submit the application.

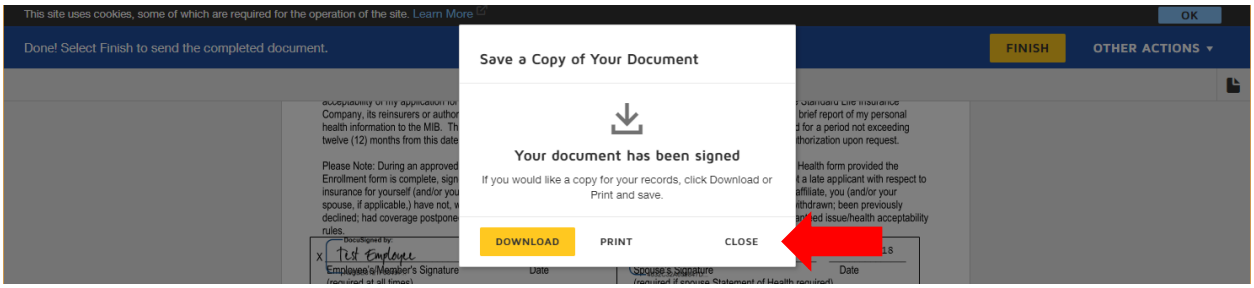


Step 35: A new pop-up window will appear to indicate that the employee has completed their portion of the application.

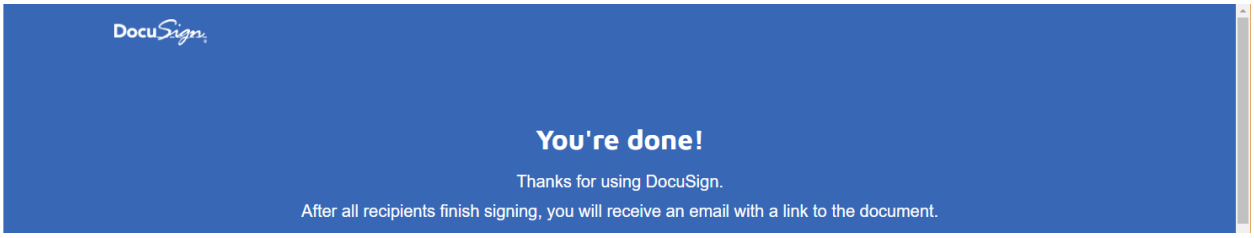
Please note: It is optional to download or print the application.

Now, both employee and spouse portions of the application are complete and DocuSign will send the application to RSL Medical Underwriting email alias for processing in real time.

The spouse can click “Close.”



Step 36: Once the spouse clicks “Close,” they will see the window as shown below.



Step 37: The employee and spouse will receive an email confirmation from DocuSign with the completed EOI form attached.

