

DOCUSIGN ENHANCEMENTS FOR AGENTS SUBMITTING FINAL EXPENSE NEW BUSINESS

FREQUENTLY ASKED QUESTIONS

Q1. What's changing with your messaging?

A. We're updating our emails to streamline both DocuSign and non-DocuSign outstanding requirements on Final Expense products in one message as well as increase the automation so that you get more instant correspondence during the application process. It will also help lower the number of emails you receive.

Q2. What's changing with electronic pending policy application forms?

A. We're using more features of DocuSign to speed up the exchanges you have with your clients during the pending policy application process. Anything going to your clients will specify only documents eligible for electronic signature, with a single link to them.

Q3. Is DocuSign going to be used for all application documents?

A. No, only for ancillary pending policy application documents. Some examples:

- Replacement Forms with application signature pages
- Payment Authorization
- HIPAA Authorizations
- Electronic Consent
- Electronic Terms and Conditions
- Agent Report

Other forms will continue to go through the manual process. You would reach out to your client for signatures as needed.

Q4. For the new email notifications, how will I track the documents that are eligible for DocuSign versus any ineligible ones?

A. Our updated email formatting will split out the DocuSign and non-DocuSign forms for a given policy application and specify whether or not you have to take action to get a client's signature or if your signature is required on a form. For the DocuSign eligible ones, your client will receive an email with a link to complete them; then you get a notification upon their completion.

Q5. Is this change for any products other than final expense (FE)?

A. No, the updates are only for FE policies.

Q6. When do these enhancements go into effect?

A. The updates will roll out on the evening of November 16, 2023.

Q7. Do these changes affect any other part of the application process?

A. No, you'll submit applications the same as before.

Q8. Is DocuSign easy for my clients to navigate?

A. Absolutely. When they open a given document to read and eSign, the platform walks them through any areas that need initials or signatures. It also tracks completed sections so that if at any time they need to ask you questions before submitting the form, it saves their progress for ease of returning to where they left off.

Q9. How does my client get to the DocuSign portal?

A. If there are any outstanding documents that require an electronic signature, they'll receive an email listing those applicable items with a link to the DocuSign portal. You'll be cc'd on any messaging sent to the owner/insured/third-party payer.

Q10. How do I create an account and log in?

A. There's no need to create an account. The DocuSign link is secure/encrypted, and all the individual does is enter the last 4 digits of their Social Security number or Individual TIN.

Q11. How do I know if you have the right email address for me on record?

A. You can reach out to our Contracting and Licensing team to verify the correct information. Or, visit your specific agent portal. There, you can see (and in some cases modify) your contact information, which synchronizes with our records. Please only include one address related to your agency, not a personal email address.

Q12. How do I contact Transamerica's Contracting and Licensing department to update my information, including my email address?

A. Here are some points of contact to change your information:

- PPlus - Brokerage: ascl@transamerica.com
- TAN - tpcl@transamerica.com
- Horizon - tlp-crcontractadmin@transamerica.com
- DSS P7 - lic_commemail@transamerica.com

Q13. What are the benefits of DocuSign?

A. Using DocuSign helps with faster application cycle times, enhances and improves our overall digital capabilities, and saves a few trees in the process.

Q14. What happens if my client refuses to use DocuSign or their link times out?

A. A pending policy can only go through DocuSign once. If for some reason a document isn't completed through DocuSign, you'll get an email with those outstanding documents attached. They'll have to complete documents via wet signature and submit them manually. DocuSign links are active for 14 calendar days.

Q15. If there is a third-party payer on a pending policy application, is their access to information limited or do they have access to all documents and information?

A. The parties associated with a particular application only have access to the information sent to them. In the event there's a third-party payer, they are restricted only to the forms they need to sign (insured name and the last few digits of an application number will be in their email for reference).

Q16. What if I have questions about how to use DocuSign?

A. You can reach out to your home office support team.

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