

Steps for Guiding your Applicant through the A.I.G. DocuSign Process

Important Tip: This process requires PATIENCE. DO NOT get off the phone. If you don't get the signature immediately, you will probably never get it. Stay with it!

1. Ask your applicant to put their phone on speaker phone so they can still hear you while they are signing (You may have to walk them thru this step)
2. Ask them to open their email (You may have to help them find their email. Most of our applicants use an Android phone. You need to learn how to help them go to home screen and find their email)
3. Find the email from AIG
4. Open the email
5. Click the Review Documents button
6. Help them find the little checkbox that says "I agree to docuSign..."
7. Click the Continue button (should be in top left)
8. Click the Start button
9. Click the Sign button
10. Draw a signature
11. Click Adopt and Sign button (Insured section)
12. Click Adopt and Sign button (Payer section)
13. Click Finish button
14. Click No to creating a free docuSign account
15. Click Yes or No to saving a copying of the application to their device
16. THIS STEP IS WHERE YOU CLICK ON YOUR DASHBOARD TO CONFIRM IT HAS MOVED TO COMPLETED AND IS NO LONGER PENDING
17. Provide your applicant with their AIG policy number