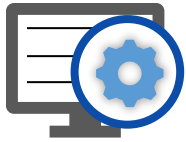




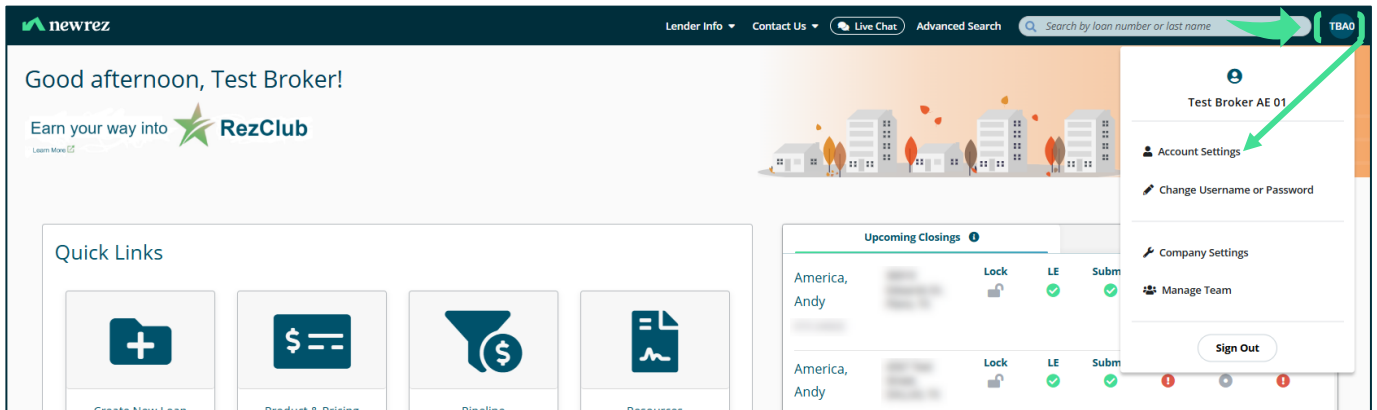
Broker Steps to Complete eSign with OneSpan



The following steps demonstrate the process for a business partner to locate their OneSpan access code and complete the eSign process.

Step

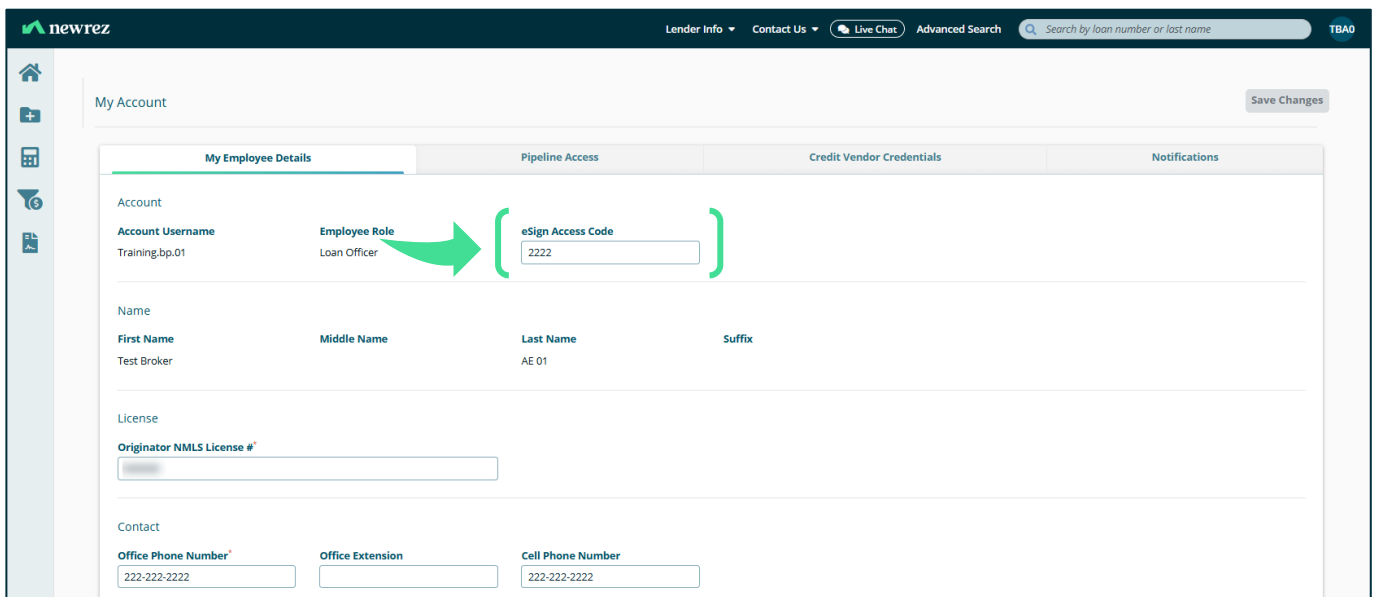
- 1 Access Account Settings from profile icon in top right corner of Blueprint



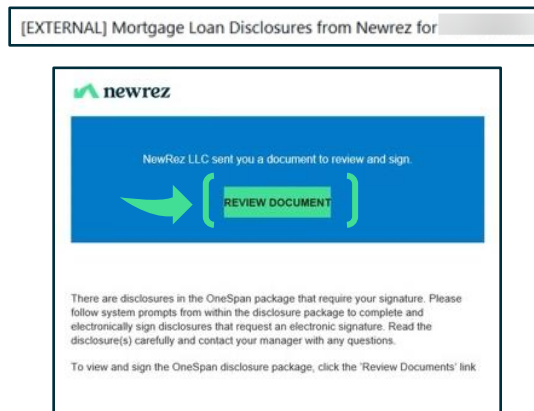
Step

2 Locate eSign Access Code

- Access code is set to the last 4-digits of the office phone number at the time the profile was created. The accuracy of this code depends on the information entered during profile creation.
- Users can update their eSign access code at any time by entering a new code in the **eSign Access Code** field and clicking **Save Changes**.
- Once the eSign Access code is changed, it will only apply to disclosure packages sent after the change was made. The updated access code will not work on previously sent disclosure packages.



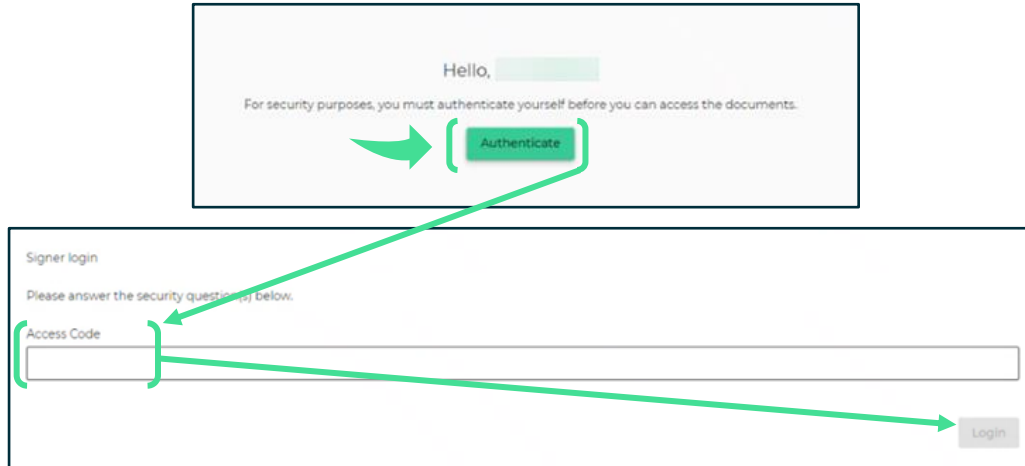
3 Open OneSpan email and select 'Review Document'



Step

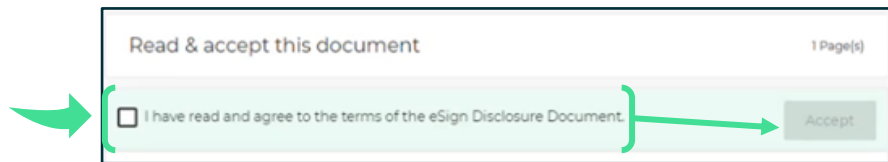
- 4 Click 'Authenticate' and enter Access code. Then click 'Login'.

- Users have 6 attempts to enter the password before being locked out.



The screenshot shows a two-step authentication process. The first step is a message that says "Hello, [redacted]" followed by "For security purposes, you must authenticate yourself before you can access the documents." A green arrow points from this message to a green "Authenticate" button. The second step is a "Signer login" form with the instruction "Please answer the security question(s) below." It features a text input field labeled "Access Code" and a "Login" button. A green arrow points from the "Authenticate" button to the "Access Code" field, and another green arrow points from the "Access Code" field to the "Login" button.

- 5 Attest to Electronic Record and Signature Disclosure and select 'Accept'.



The screenshot shows a document titled "Read & accept this document" with "1 Page(s)" in the top right corner. Below the title is a checkbox followed by the text "I have read and agree to the terms of the eSign Disclosure Document." A green arrow points to the checkbox, and another green arrow points from the checkbox to a green "Accept" button.

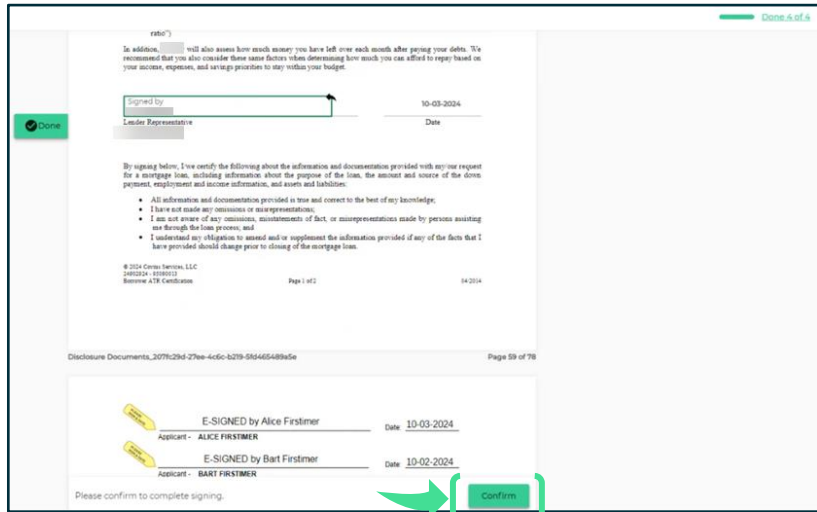
Step

6 Select 'Next' and click 'Sign' for all required signature fields.



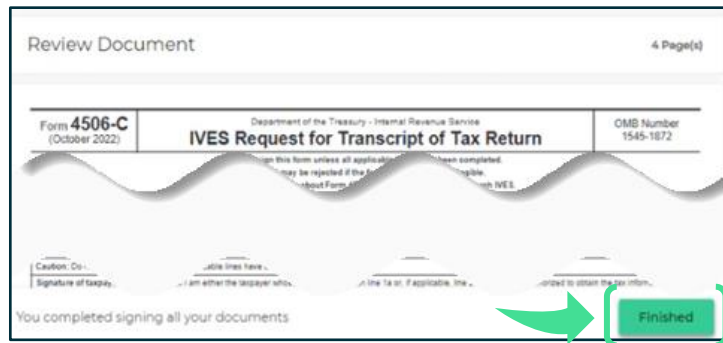
7 Click 'Confirm' when finished signing.

- A **Done** icon will appear in the left margin when all required signatures have been captured.



8 Click 'Finished' on 4506C document.

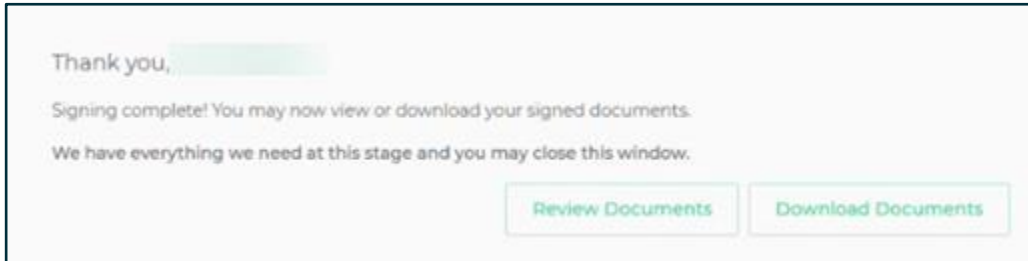
- No signatures are required from the business partner on the 4506C.





Step

- 9 Confirmation screen will populate once signing is complete.





Record of Revisions

Revision Date:	Revision Reason:	Created By:	Summary of Changes
7/18/2024	Created	Casey Bruins	
10/7/24	Update	Casey Bruins	Adoption of OneSpan
10/18/24	Update	Brian Rummell	Updated per Legal for approval
11/21/24	Update	Brian Rummell	Added steps to locate and change eSign access code.

