

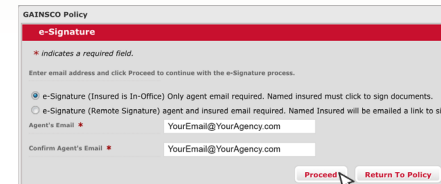
GAINSCO's free, integrated e-Signature solution is the preferred signing method when binding new business or endorsing and reinstating policies

Initiate e-Sign



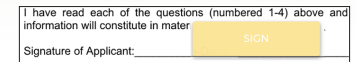
Click the Sign link on the policy transaction screen

Choose in-office or remote signature and complete required information



In-office (only agent email required, follow onscreen handoff instructions)
Remote (insured and agent email required)

Instruct signatory to e-Sign and CONFIRM when prompted



Select **DONE** to finalize signatures

eSignature is complete for an individual when you see **Done** next to their name
 Choose **REVIEW DOCUMENTS** to view signed forms
 Signed documents will also be emailed to the address(es) used

Monitor eSignature Report

Access the Report

Review the eSignature Report to ensure customers successfully e-Sign

Set a calendar reminder to work your eSignature Report a few times per week

On GAINSCOconnect.com, choose eSignature Report

| REPORTS |
|--------------------------|
| Policies Issued |
| Policy Changes |
| Pending Cancellations |
| Canceled Policies |
| Renewal Offers |
| eSignature Report |
| Commission Statement |
| MVR Chargebacks |
| Sweep Reconciliation |
| Tasks |

e-Signature must be completed within 3 days to avoid adverse policy action such as policy cancellation

Generate the Report

Report Date Range: To
 Status:
 Or
 Policy #:

Search by date, e-Signature status or policy number

| Name Insured | Policy # | Method | Current Status |
|--------------|----------|---------------|----------------|
| John Smith | OHPA000 | Not In-Office | Expired |
| John Smith | OHPA000 | In-Office | Deleted |

The eSignature Report shows the current e-Sign status for all policies listed

Review e-Sign Status

INITIATED Request to e-Sign sent. *Instruct customer to e-Sign.*

COMPLETED e-Sign is complete. *No further action needed.*

DELETED e-Sign canceled by agent. *Wet sign and keep in agency file.*

DECLINED/OPTED OUT e-Sign was initiated, and customer declined. *Take additional steps indicated.*

PARTIALLY SIGNED e-Sign not yet completed. *Instruct customer to e-Sign.*

EXPIRED e-Sign request expired. *Reinitiate e-Sign.*

EMAIL BOUNCED e-Sign request could not be delivered to email address provided. *Contact customer, ask for correct email address and reinitiate e-Sign.*

INSIDER SCOOP

If using your own e-Signature solution, visit **Notes/Document Upload** to download forms to use in your own e-Sign process

| Notes/Document Upload | Forms/Document Upload | | | | | | | | | | | | |
|-----------------------------|---|---------------|------|----------|---------|----------|----------|-----------------|----------|-------------|---------------|----------|---------------|
| John Smith 04/13/2021/23 | <table border="1"> <thead> <tr> <th>Caption</th> <th>Date</th> <th>Filename</th> </tr> </thead> <tbody> <tr> <td>PKG-New</td> <td>1/1/2021</td> <td>Form.pdf</td> </tr> <tr> <td>PKG-Endorsement</td> <td>1/1/2021</td> <td>Endorse.pdf</td> </tr> <tr> <td>PKG-Reinstate</td> <td>1/1/2021</td> <td>Reinstate.pdf</td> </tr> </tbody> </table> | Caption | Date | Filename | PKG-New | 1/1/2021 | Form.pdf | PKG-Endorsement | 1/1/2021 | Endorse.pdf | PKG-Reinstate | 1/1/2021 | Reinstate.pdf |
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| PKG-Reinstate | 1/1/2021 | Reinstate.pdf | | | | | | | | | | | |

In the rare event that you initiate e-Sign and the customer chooses **DECLINE TO SIGN** , return to policy transactions, choose Sign link, click the cancel button, and contact customer service to request a paper application. Collect wet ink signatures and keep in agency files.

