

# eDelivery

## Common questions answered

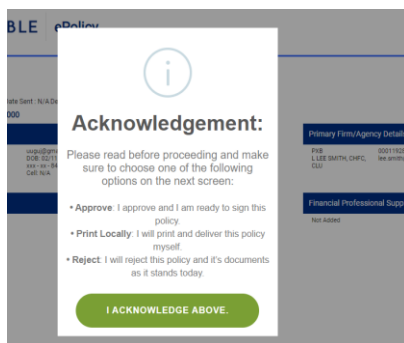
### Q: Can I elect eDelivery after I submit the application?

A: Yes, if the authorization form is received in good order prior to underwriting approval and policy print. The authorization form can be found in eForms for Life.

### Q: What if my client changes their mind and no longer wants eDelivery?

A: The delivery method can be changed multiple ways.

- Prior to underwriting approval, contact your Relationship Case Manager.
- When you receive the notification email that the policy is ready for your review, click on the link within the email. Click *I acknowledge above* and then select *Print locally*. We will mail you a policy, and you can print the PDFs.

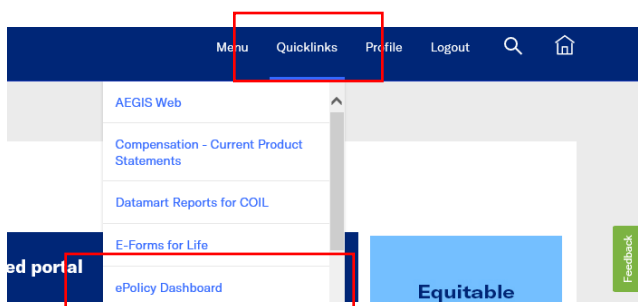


### Q: Can I request a paper policy after the policy has been eDelivered?

A: The primary agent of record can access the ePolicy Dashboard at any time and print the policy PDF.

### Q: How do I access ePolicy Dashboard?

A: Log into Equitable Distributors. Select *Quicklinks*. Select *ePolicy Dashboard*.



**Q: Can I print and deliver a paper policy and have my client complete the eDelivery process?**

A: No. When you access the link, you are presented with an acknowledgement. You can only choose one option: Approve, Reject or Print Locally. Bypassing and not acting will not end the workflow and we will continue to send email reminders to act.

**Q. What happens when action is not taken on the links to complete delivery?**

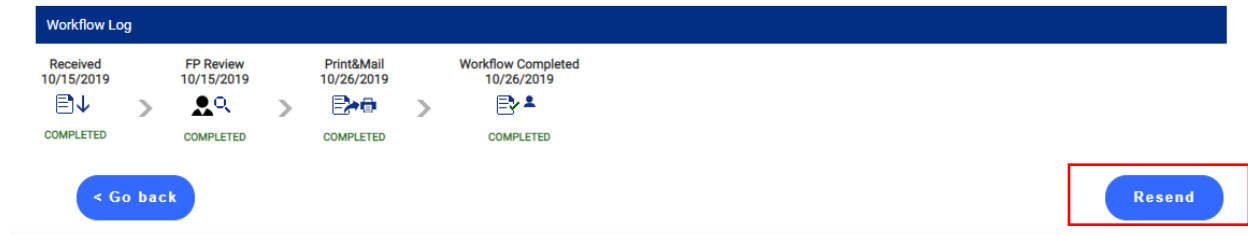
- If no action is taken by the Financial Professional, we will send a reminder email on day 3 and day 6. Day 9, we will automatically default to paper print and the eDelivery workflow is ended.
- If no action is taken by any signing party (Insured, Joint Insured, Owner, Joint Owner), we will send a reminder every 3 days. The Financial Professional will receive a courtesy notification. If no action is taken by day 21, we will default to paper print and eDelivery workflow is ended.

**Q: What if I deleted my email link to access the policy?**

A: Log into Equitable Distributors. Select Quicklinks. Select ePolicy Dashboard. Search by policy number. Click on the policy number. From here, you can act.

**Q: What if my client did not receive the email or deleted the email?**

A: The Financial Professional can access the ePolicy Dashboard through Equitable Distributors and resend the email link. Click Resend. You will be provided a checklist to select which party you want to resend the link. The selections will be: Insured, Joint Insured, Owner, Joint Owner.



**Q: What steps do I take if I find an error in the policy or want to have changes made?**

A: Reject the policy and contact your Relationship Case Manager.

**Q: How can I keep track of where a policy is in the electronic process?**

A: Within the ePolicy Dashboard. Search by policy number and view the workflow history. Workflow history icons can be found in the Quick Reference Guide.

**Q: Where is the electronic signature ceremony occurring, and is it done sequentially or in parallel?**

A: The signature signing ceremony occurs in parallel using industry-standard eSign technology, DocuSign.

**Q: Once all parties sign the delivery requirements, what's next?**

A: The delivery requirements are returned to Equitable's Operations Center for processing. A copy of the signed documents will be stored on the ePolicy Dashboard. The signed documents are viewable once the workflow is displaying as complete.

**Q: What does not qualify for eDelivery?**

A: International Underwriting Program (IUP), Guaranteed Issue, and COIL Institutional Series<sup>SM</sup> product.

**Q: What happens if there is an email hard bounce (email address invalid)?**

A: We will send the Financial Professional an email of bounce. The Financial Professional will be required to obtain the correct email address and contact the Relationship Case Manager.

**Q: What happens if there is an email soft bounce (mailbox is full)?**

A: We will resend over a 48-hour period. If unsuccessful, we will default to paper print.

**Q: What is the authentication process?**

A: Depending on who is required to sign documents, the authentication will vary. Refer to the Resource Guide for details.

**Q: Who do I contact to report a problem?**

A: Life Operation live telephone support from 8 am-7 pm, 855-606-6452, option 3.  
Email support: [Life\\_ePolicySupport@equitable.com](mailto:Life_ePolicySupport@equitable.com)

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