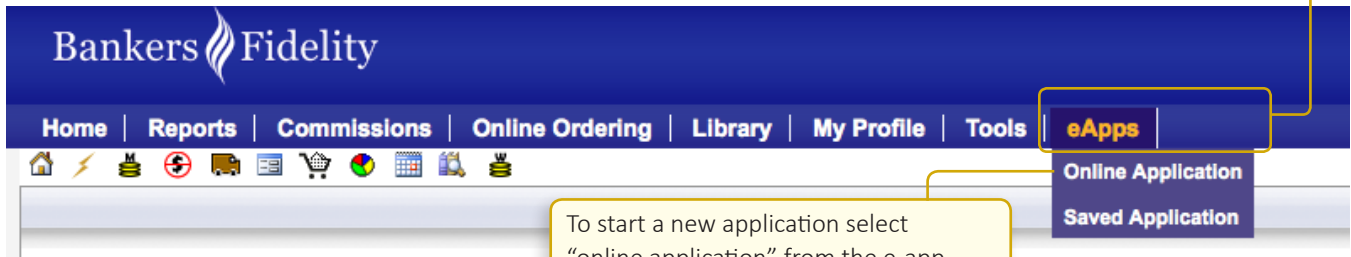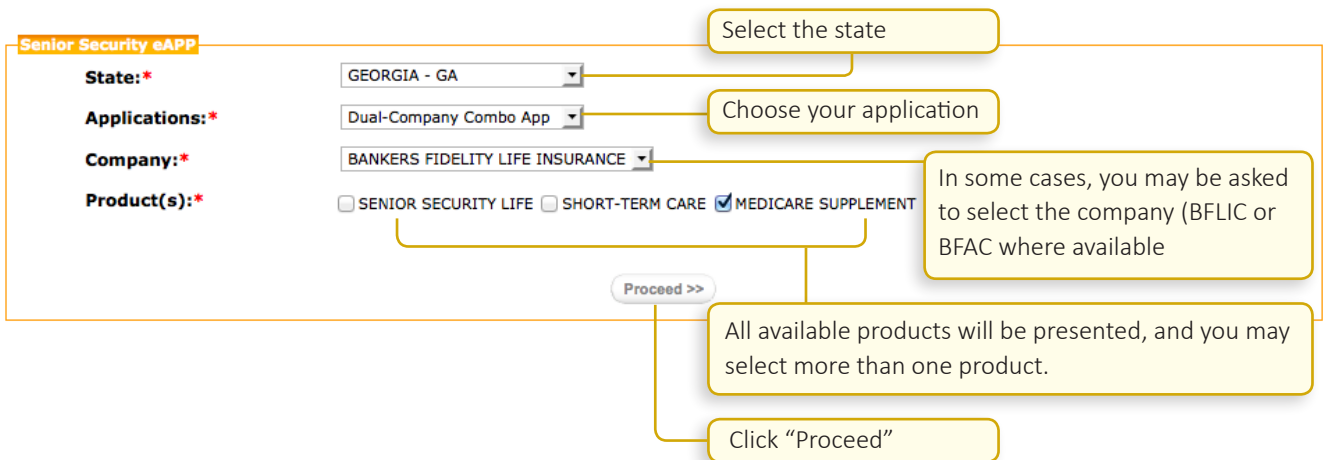# Electronic Application (e-App) Quickstart

How to Access the e-App

Our e-app was developed to match the paper application that you are already familiar with. It's housed within ADDS (Agency Data Distribution System) under the e-app tab on the far right of the screen.
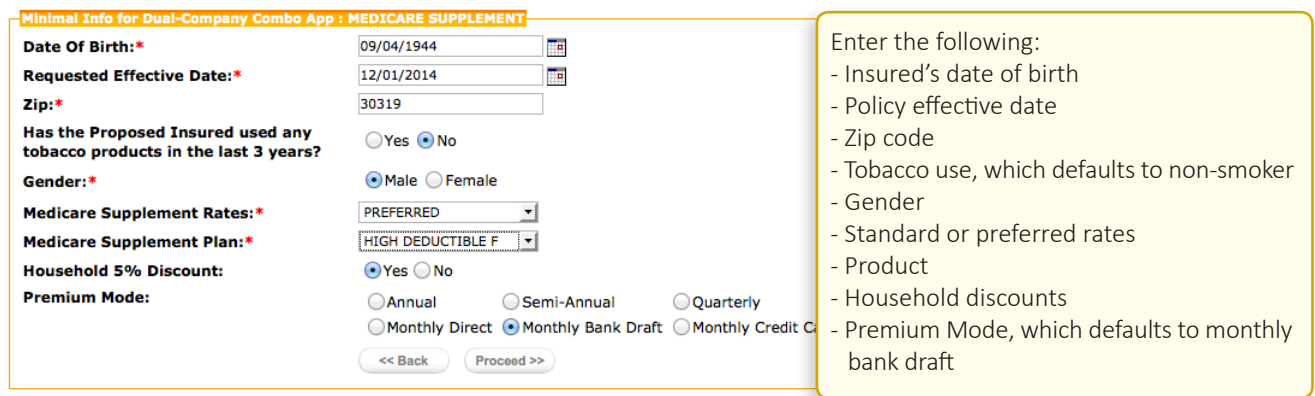

To start a new application select "online application" from the e-app dropdown menu.

Completing your Application

You can now begin the quoting section

Select the state

Choose your application

In some cases, you may be asked to select the company (BFLIC or BFAC where available

All available products will be presented, and you may select more than one product.

Click "Proceed"

Obtain minimum information in order to get a quote.

Enter the following:
- Insured's date of birth
- Policy effective date
- Zip code
- Tobacco use, which defaults to non-smoker
- Gender
- Standard or preferred rates
- Product
- Household discounts
- Premium Mode, which defaults to monthly bank draft

Premium Details	
Product Name	Electronic Draft Premium
MEDICARE SUPPLEMENT PLAN HIGH DEDUCTIBLE F	$57.00
Total:	$57.00

<< Back   Proceed >>

You will be presented with a quote. Select this quote or hit back to generate a new quote. The information you have entered will be automatically uploaded into your application.

You can discard the application at any time and start over if you need to.

Application Form	HIPAA Agreement Form	Electronic Draft Form	Medicare Supplement Replacement	Life Replacement	Review

Across the top of the application, you will notice a set of tabs, each tab noting a required document.

Save and Continue takes you to the next ta **Save & Continue**

Very Important: you must select whether this is a face-to face application or via telephone.

This application was taken by me personally interviewing the Proposed Insured: ⦿ Face-to-face ◯ via Telephone

- This selection is going to determine the type of DocuSign event that happens.
- Telephone application will use the client's email address.
- Face-to-face, the client is sitting in front of you.
- Or you could use a web conference where you give control of the mouse and keyboard to the signer.

It's important that you put the city and state where the signing is happening. DocuSign will fill in the insured's signature, name, and date.

Dated at _Atlanta, Georgia_____, on _____ X _____
     City and State   Month, Day, Year   Agent's signature

Proceed to the electronic draft form
- Indicate whether it's a checking/savings account or credit card.
The Review tab renders a copy of the app just as if you printed it out. Any incomplete areas within the application will be marked with a red exclamation point. Return to the document to correct any errors.

DocuSign e-signature process

The screen will list the standard instructions to follow for collecting an e-signature
The first signature block prompts signer to adopt a scripted electronic signature.
- They can opt for the default signature or "sign" their own using the mouse.
- It doesn't matter what it looks like. The codes at the bottom that are part of the electronic signing are really what are important.
- You only have to do the adopt step one time. From then on, they just click the Sign button.

If they want a copy emailed to them, they can enter their email address.
The agent is then prompted for signature using a similar signing process.

Submit to the Home Office

You'll now find your completed application in the "Saved Application" tab under the e-app dropdown

Tools | eApps
Online Application
Saved Application
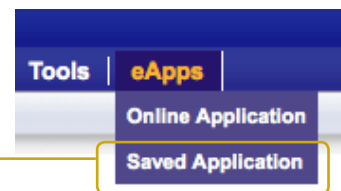
This tab shows you each application's status – whether it's incomplete, pending signatures, etc.
Click the Submit button on the application you just completed. It will now be sent to Bankers Fidelity headquarters to be processed.

You'll see a prompt stating that you have a successful submission.

Bankers Fidelity®