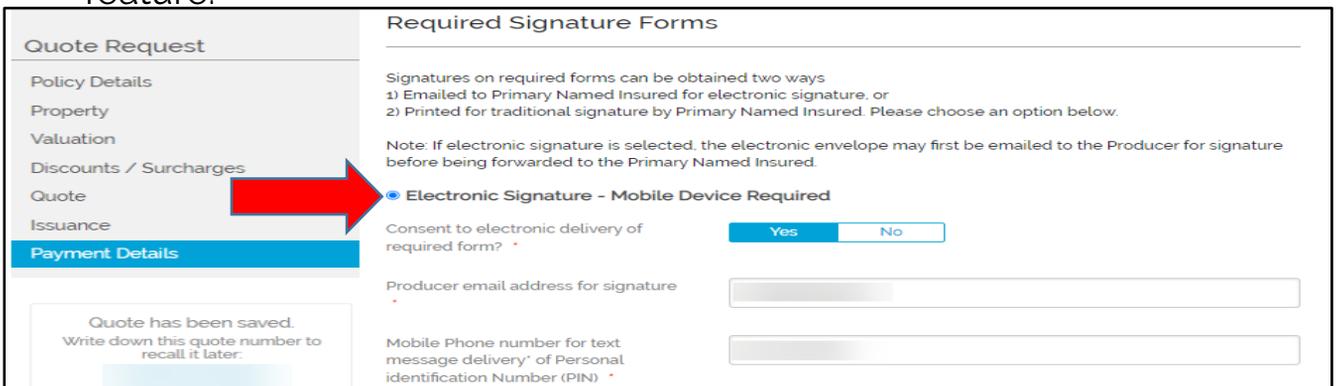


AMsuite[®] Electronic Signature Process in AMsuite

The following pages will provide step by step instructions on how to use Electronic Signature to sign the required forms. The instructions will guide how to send documents within a quote and when a policy is issued by using Electronic Signature.

- 1 Select **Electronic Signature** on the Payment Details Page. The customer must have an active email address and mobile device in order to use this feature.



Quote Request

- Policy Details
- Property
- Valuation
- Discounts / Surcharges
- Quote
- Issuance
- Payment Details**

Quote has been saved. Write down this quote number to recall it later.

Required Signature Forms

Signatures on required forms can be obtained two ways
 1) Emailed to Primary Named Insured for electronic signature, or
 2) Printed for traditional signature by Primary Named Insured. Please choose an option below.

Note: If electronic signature is selected, the electronic envelope may first be emailed to the Producer for signature before being forwarded to the Primary Named Insured.

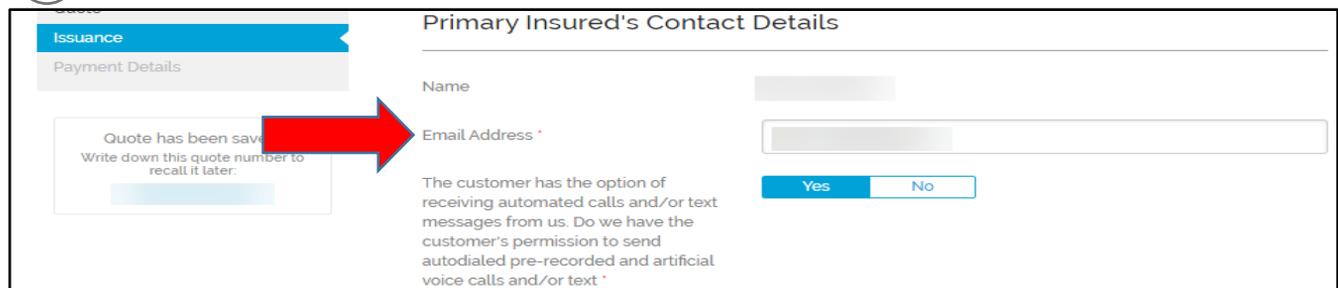
Electronic Signature - Mobile Device Required

Consent to electronic delivery of required form? Yes No

Producer email address for signature

Mobile Phone number for text message delivery* of Personal identification Number (PIN)

- 2 Verify the customer's email address on the Issuance Page.



Issuance

- Payment Details

Quote has been saved. Write down this quote number to recall it later.

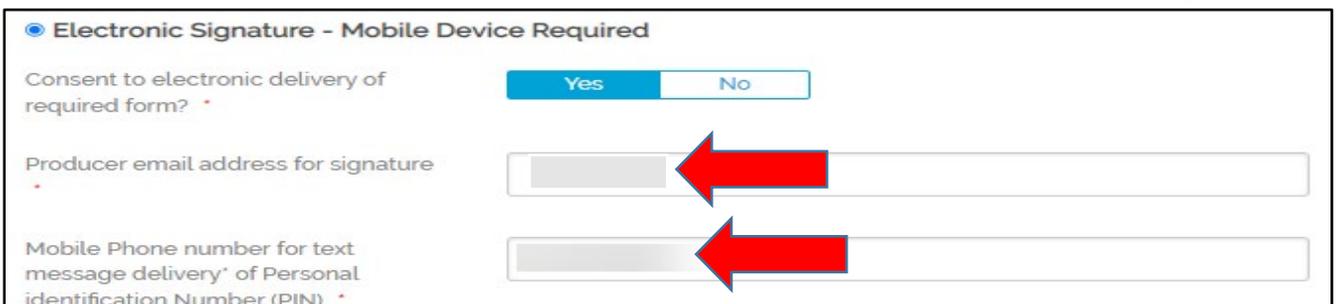
Primary Insured's Contact Details

Name

Email Address

The customer has the option of receiving automated calls and/or text messages from us. Do we have the customer's permission to send autodialed pre-recorded and artificial voice calls and/or text? Yes No

- 3 Verify the agent's email address on the Payment Details Page as this is the address that the originating E-Signature will be directed to. Verify the customer's mobile device on the Payment Details Page.



Electronic Signature - Mobile Device Required

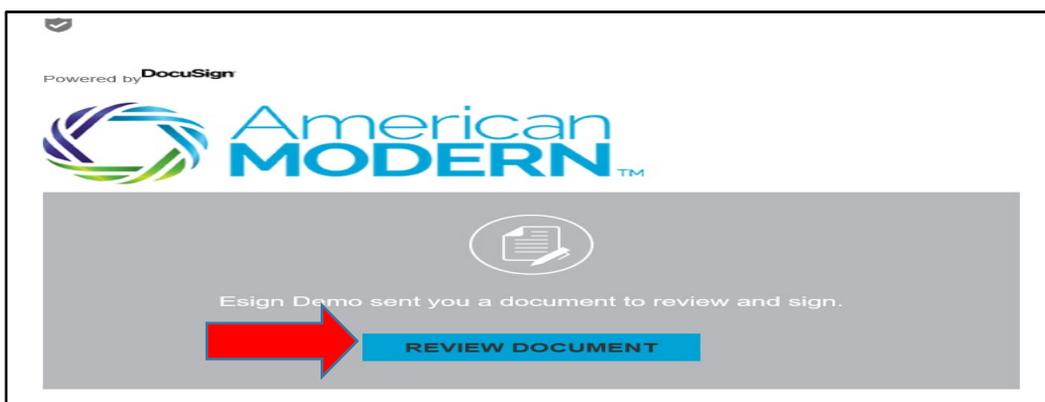
Consent to electronic delivery of required form? Yes No

Producer email address for signature

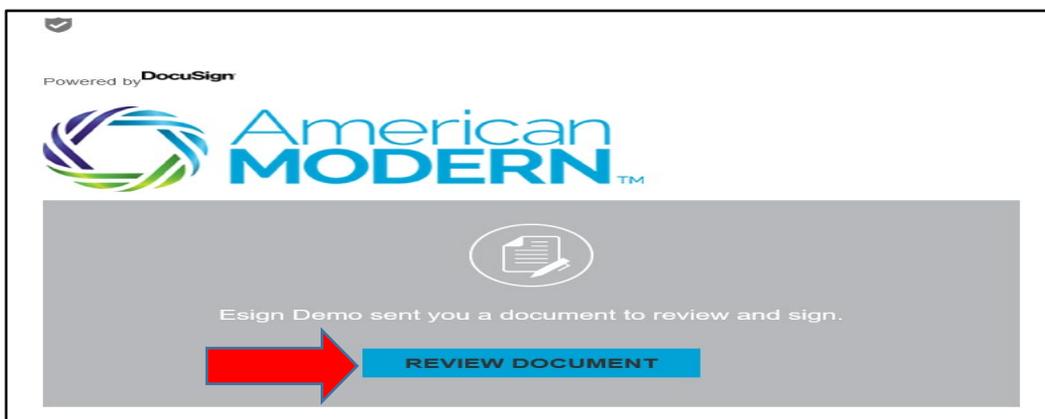
Mobile Phone number for text message delivery* of Personal identification Number (PIN)

AMsuite® Electronic Signature Process in AMsuite

- ④ Once the quote or policy change is issued, the agent will receive an email directing to review and sign any forms associated with this policy that require agent signature within the e-signature documents. This will generate an email to the insured with instructions for e-signature.
 - DocuSign sends a daily email reminder if the agent does not sign the first or second day. If the agent does not sign by the third day, they will receive an activity to follow up on the required signature forms



- ⑤ The insured will also receive an email with a link to the required forms to electronically sign. The insured has 14 days, with a reminder after 7 days, and then 3 days before the expiration. This is an example of what the insured will see in their email to start the e-signature process.



AMsuite[®] Electronic Signature Process in AMsuite

- 6 Once starting the review, the insured enters the primary named insured's 4-digit year of birth as the Access Code and select **Validate**.

Identity Confirmation

 **Esign Demo**
American Modern Insurance Group

American Modern Insurance Group has requested that you enter the primary named insured's four-digit year of birth, in YYYY format, as the access code. Please enter the code and validate to proceed. If you have any questions, please call 1-800-543-1444.

Access Code: YYYY Format
 Show Text **VALIDATE** CANCEL ESIGNATURE REQUEST

↓

Primary named insured enters their four-digit year of birth and selects Validate.

- 7 The insured validates the mobile phone number that is displayed. Select **Send Text** to receive a pin to input into DocuSign.

- A PIN (Personal Identification Number), is an authentication code that is sent by text to the insured's mobile phone.

Identity Confirmation

 **Esign Demo**
American Modern Insurance Group

Mobile Phone Authentication

In order to access this document, you need to confirm your identity using your mobile phone.

1. Choose a phone number below and select the "Send SMS" button to receive a text message.
2. Enter the access code on the following page.

Authenticating Signer Name:

Standard text messages rates apply.

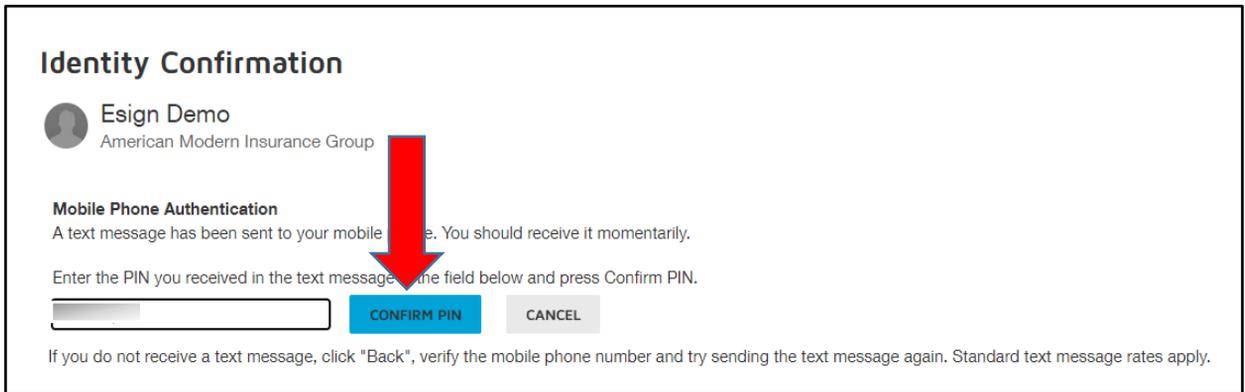
Validate the primary named insureds mobile phone number and select Send Text.

➔ **SEND TEXT** CANCEL

If you do not have access to your mobile phone at this time, select "Cancel" and retry when you have access.

AMsuite[®] Electronic Signature Process in AMsuite

- 8 The insured enters the PIN/Authentication code received via mobile phone text and selects **Confirm Pin**. The insured has now been validated.



Identity Confirmation

 **Esign Demo**
American Modern Insurance Group

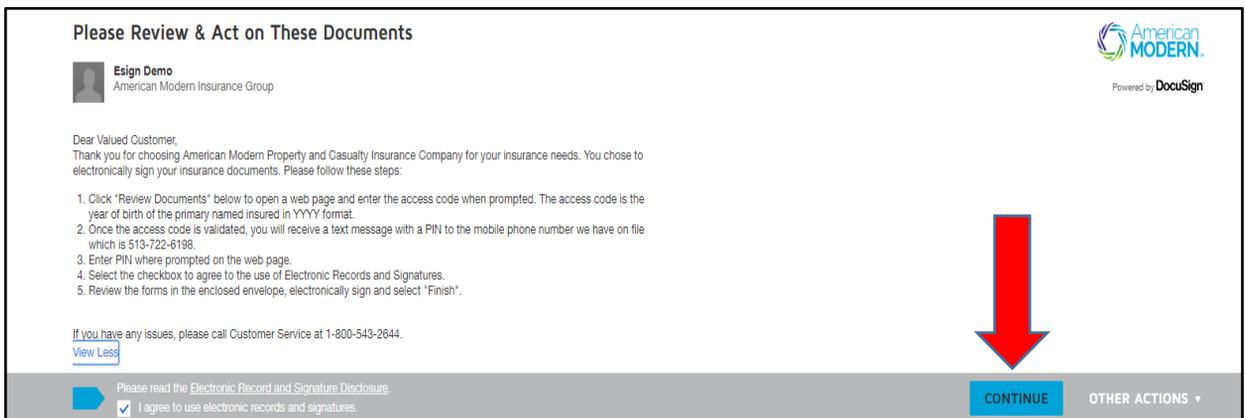
Mobile Phone Authentication
A text message has been sent to your mobile phone. You should receive it momentarily.

Enter the PIN you received in the text message in the field below and press Confirm PIN.

CONFIRM PIN **CANCEL**

If you do not receive a text message, click "Back", verify the mobile phone number and try sending the text message again. Standard text message rates apply.

- 9 The insured reviews the forms, selects the option to agree to the Electronic Record and Signature Disclosure then select **continue**. The required signature forms will now be available to adopt the signature and complete the DocuSign. Once completed, an email will be sent to both the agent and insured of the completed documents. A copy of the signed forms will be sent to AMIG and attached to the policy.



Please Review & Act on These Documents

 **Esign Demo**
American Modern Insurance Group


Powered by **DocuSign**

Dear Valued Customer,
Thank you for choosing American Modern Property and Casualty Insurance Company for your insurance needs. You chose to electronically sign your insurance documents. Please follow these steps:

1. Click "Review Documents" below to open a web page and enter the access code when prompted. The access code is the year of birth of the primary named insured in YYYY format.
2. Once the access code is validated, you will receive a text message with a PIN to the mobile phone number we have on file which is 513-722-6198.
3. Enter PIN where prompted on the web page.
4. Select the checkbox to agree to the use of Electronic Records and Signatures.
5. Review the forms in the enclosed envelope, electronically sign and select "Finish".

If you have any issues, please call Customer Service at 1-800-543-2644.
[View Less](#)

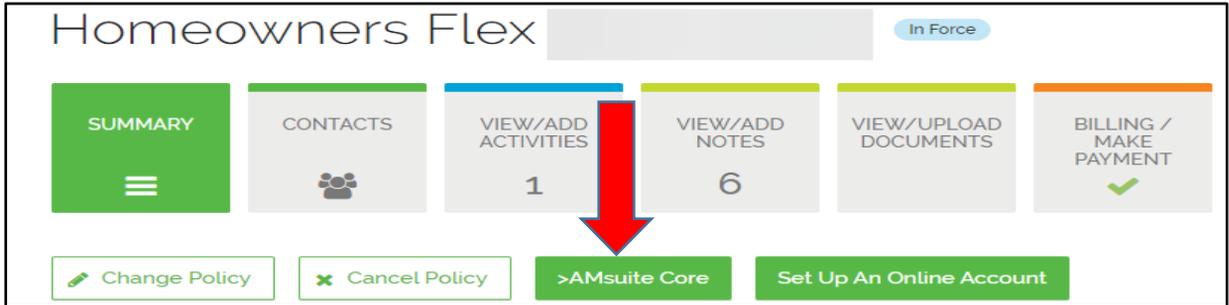
Please read the [Electronic Record and Signature Disclosure](#).
 I agree to use electronic records and signatures.

CONTINUE OTHER ACTIONS ▾

- If the insured does not select the option to sign, they receive an e-mail reminder on the 11th and 14th day as a reminder to sign. The customer has 14 days to sign before an activity is sent to the agent to follow up on required signature forms.
- If the insured declines to sign, an activity is sent to the agent to follow up on the required signature forms.

AMsuite[®] Electronic Signature Process in AMsuite

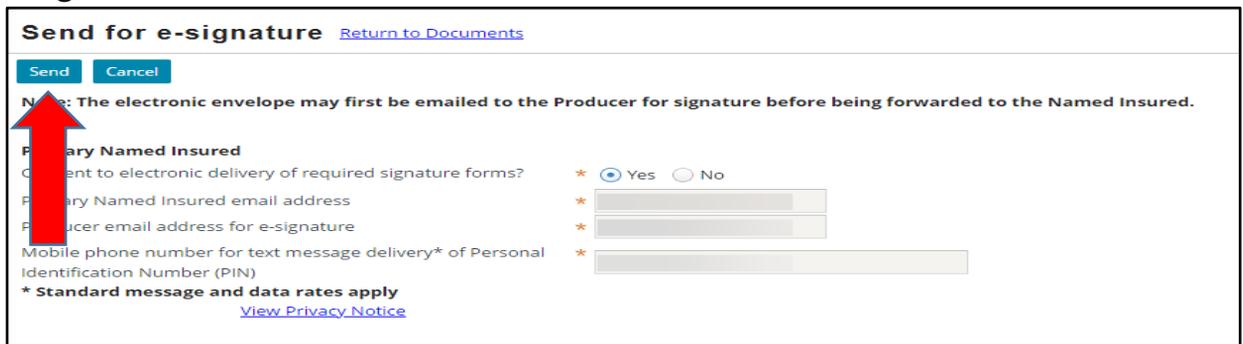
10 If the agent needs to re-start the e-signature process, the document can be resent in **AMsuite Core**.



11 In AMsuite Core select the **documents** tab. Within the documents tab, the documents requiring signature will be listed. Select the box by the documents that requiring a signature. Select **Send for e-signature**.



12 Verify the required fields. Select **Send** to resend out the document by e-signature.



Send for e-signature [Return to Documents](#)

Send Cancel

Note: The electronic envelope may first be emailed to the Producer for signature before being forwarded to the Named Insured.

Primary Named Insured

Consent to electronic delivery of required signature forms? Yes No

Primary Named Insured email address *

Producer email address for e-signature *

Mobile phone number for text message delivery* of Personal Identification Number (PIN) *

* Standard message and data rates apply [View Privacy Notice](#)

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